

## Field Research (International) Planning Time-Table

This planning timetable is a guideline to facilitate field research. The timelines recommended will vary depending on how remote your research site is and how accessible supplies are. The recommendations are general and are not meant to be all-inclusive.

### 8 months prior to departure (or earlier)

- Research the safety and appropriateness of locations for travel. Go to the [Government of Canada's Travel Advice and Advisories](#) website and research where you are going
- Make sure all study personnel's travel documents are sufficient for where you are going. [The International Air Transport Association](#) (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
- All countries require that individuals obtain special permission for entry when they plan to work in the country. This permission is called a visa or work permit.
  - Only the country concerned can provide entry requirements. Some visas can take several months, so make enquiries early
  - Visit Canada's [Travel Site](#) to find more information on visas
  - Obtain the required visa or work permit from that country's embassy or consulate accredited to Canada (i.e. that provide consular services in Canada). Contact information for foreign embassies and consulates in Canada can be found via [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

### Early Planning

- Begin drafting your Field Activities Plan (FAP) which will help ensure you address issues such as training needs (including first aid), lodging, equipment, communications, emergency response plan, etc.
- Prepare any Standard Operating Procedures (SOP) for things such as vehicles, equipment, communications, risky procedures (e.g. climbing, using chainsaws or other hazardous equipment, biohazards, etc.)
- Consider any hiring needs (e.g., research assistant), what qualifications you are seeking, and any special training needs
- Find out about local laws, customs, holidays, seasonal weather issues and time zone.
- Make initial inquiries regarding permits, permissions, licenses, access to lands, animal use or human ethics approval, if needed
- If you are planning to travel outside of Canada with accompanying University equipment, you should consider the following well in advance of your trip, to avoid unnecessary delays and complications with domestic and foreign customs agencies. Be sure to have a list of equipment, export permits, customs documentation, contacts within AU, Customs Division, and References prepared
  - 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)



- The country of manufacture of the equipment or goods – all equipment or goods manufactured in the United States of America require either an export permit or expert authorization
- 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**

### **Contacts**

- Register at the applicable Canadian Consular Offices abroad in non-EU or North American countries. See the [Government of Canada's Registration for Canadians Abroad](#)

### **Security & Health**

- Make sure participants are aware of risks associated with (both prescription and non-prescription) drugs and travel – see [Drugs and Travel Information](#) Program
- Regularly check the country Travel Reports for information on safety and security, local laws and customs, health conditions, and entry requirements
- Check the Government of Canada [Travel and Tourism](#) site for information on health regulations, passport and customs regulations, etc.
- Check [IATA](#) for information on air travel
- Check vaccination recommendations for your destination(s) and advise all participants. Assess health risks so you can plan accordingly. The [International Association for Medical Assistance to Travellers](#) (IAMAT) has information on vaccinations, immunizations, disease risks, etc.
- The [World Health Organization](#) (WHO) is also an excellent resource

### **Planning**

- Make travel arrangements.
- Determine your communication device needs (kind, number, cost). 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. You may wish to purchase inexpensive cell phones and SIM (Subscriber Identity Modules) cards to use in the destination country.
- Draft a list of equipment you will need to take with you. Keep in mind applicable regulations related to the transportation of dangerous goods, 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, including stopping points
  - Location of field destination, including description of terrain
  - Maps (in sufficient detail to be able to locate you in case of emergency)
  - Activities to be engaged in during the field activities
- Update the Field Activities Plan
- Look into additional insurance needs. Some good points to consider:
  - Includes in-house, worldwide, 24-hour emergency hotline with multilingual operators, as well as physicians or nurses on staff
  - Covers doctor's visits and prescription medications
  - Pays for foreign hospitalization and related medical costs



- Provides up-front and direct payment of bills and cash advances abroad
- Covers emergency transportation, such as ambulance
- Provides for medical evaluation/repatriation to Canada or nearest location with appropriate medical care
- Pays for medical escort (doctor or nurse) to accompany you during evacuation
- 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 you intend to visit
- If you will be driving vehicles abroad, you can apply for an [international driver's license](#)

### **5 months prior to departure**

- Complete hiring process (if applicable)
- Identify any training for personnel and make appropriate arrangements for same

### **4 months prior to departure**

- Contact local officials as necessary and appropriate (e.g., ambulance, forestry service, police, etc.) to let them know particulars of your field research activities
- Find out about currency in foreign lands. Contact banks and guidebooks for information.
- Secure a receipt book to take with you because in some developing countries, receipts may not be provided for certain purchases (e.g. gasoline, food).
- Check on legal issues, such as carrying prescription medications, and duty and exemptions for items purchased abroad.

### **3 months prior to departure**

- Confirm lodging requirements
- Check for first aid kits required and order as necessary
- Set up a Field Safety Log Book to utilize in the field for daily meetings
- Familiarize yourself with incident/injury reporting requirements. Take paper copy of reporting form with you. See [AU Occupational Health and Safety Program Guide](#)

### **2 months prior to departure**

- Verify availability and source for rental or purchase of any communication devices to be taken on trip.
- Gather all Emergency Information Forms, and
  - Copy all forms to take with you in the field and review them for any disclosed health issues
  - Ensure all original Emergency Information Forms are filed with the Research Centre
  - Speak with individuals who have disclosed health issues and plan for precautions if necessary
- Ensure an Emergency Response Plan is in place as part of your Field Activities Plan, including:
  - Emergency contact numbers for AU and for all participants on trip
  - Nearest hospital or medical aid information
  - Check-in system, as appropriate
  - Plan for contacting emergency services
  - Evacuation route in case main route is blocked by a hazard (e.g., fire)
- Check on WCB requirements with Human Resources and the Employee Health Office.



### **1 month prior to departure**

- Review supply list
- Plan and draft detailed field/project schedule
- Check all equipment to ensure it is operable

### **3 weeks prior to departure**

- Review Field Activities Plan (FAP) to ensure it is complete
- Go over the FAP in detail with all personnel
- Plan for team safety meeting to be conducted at site
- Gather and retain (filed with Research Centre and taken into the field) copies of proof of insurance; passport photo page; copies of any other pertinent travel documents

### **2 weeks prior to departure**

- Finalize trip description and itinerary. File detailed itinerary including flights and/or other transport, contact information for scheduled locations, etc. with the Research Centre and provide to your designated contact person
- 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)
  - Principal Investigator should have copies of all participants' visas and picture page of the passports
  - Ensure all participants have a copy of their insurance policy with them.
  - File proof of insurance with the Research Centre
  - File proof of pertinent vaccination/immunizations for each traveler with the Research Centre and take copy with you into the field

### **1 week prior to departure**

- Go over the FAP in detail with all personnel. Make sure copy is filed in Research Centre and Employee Health Office and that you have copies to hand out to all personnel in the field
- Make sure you have copies of your Daily Field Safety Log to use in the field
- Call and confirm with locals, as necessary, your attendance at site, number of personnel, and expected field activities start and end dates
- Ensure all permits/permissions/access to lands are in place (and filed with Research Centre)
- Finalize your trip description and itinerary and file with Research Centre
- Update list of equipment as needed and file list with the Research Centre, so they know what equipment is being used in case of an incident
- Have plan in place in case a project member needs or wants to leave the research project early
- Print off an Emergency Contact Card so you have contact information to provide to the Canadian Consulate in case of an emergency

### **Following the Field Research Activities**

- Complete any further injury/incident reports, as required
- Monitor your health for 21 days and consult a health provider if you have any of the following symptoms:



- High fever, lasting more than 2 days
- Nausea, vomiting and/or diarrhea lasting more than one week
- Persistent cough and shortness of breath
- Swollen glands in any area of the body
- Skin lesions that are enlarged, painful or ulcerate
- Other unusual symptoms
- If you receive an animal bite, you should consult your health care provider even if you received first aid treatment in the field
- Advise all personnel to monitor their health in the same manner and to advise you if they develop any health conditions that may be related to the research trip.

Debrief:

- Did any first aid treatments or evacuations take place during the research trip? Reflect on what went well, what went wrong, and determine what could have been done better
- Report debrief outcomes to the AU Employee Health Office and Research Centre, so others can benefit from your experiences
- Return all equipment leased or rented

*This form has been adapted with permission from the University of Alberta.*