

## **Integrated Microscopy Facility-Training and Access S.O.P.**

### **1. Becoming a Client:**

- a. **Setting up Orientation, Training and Access:** Please contact us at [biotron\\_microscopy@uwo.ca](mailto:biotron_microscopy@uwo.ca) or 519-661-2111 x88061 or x83777 to schedule registration orientations, consultations, or demonstrations of our facility and equipment.
- b. **Registration and Orientation**– All new users **MUST** attend an orientation session with our Technical Specialists before beginning work. During orientation they will complete a registration form, submit proof of appropriate Western University safety training, provide a speed code or invoicing information for billing purposes, and receive an orientation to the facility and its operating rules and procedures. We may request an update of the registration form periodically to keep our records current for auditing.
- c. **Orientation Package**--New clients will receive an orientation package containing our policies, price list, description of the facility and its services, and any specific equipment S.O.P. relative to their use of our equipment.
- d. **Project Consultation**– Prospective clients and their supervisors are also encouraged to attend a \*FREE\* initial consultation session with our Technical Specialists. The purpose of this meeting will be to ensure that the client’s project goals are met, and any particular needs with regards to training and sample preparation are discussed.
- e. **Demonstrations and Tours**– Clients can request a facility tour and/or a demonstration of any equipment. This service is free as long as it does not exceed one hour. Demonstrations that require more than one hour will be billed for instrument and operator time.

### **2. Training Information:**

- a. **Sample Preparation Training**-- We offer free consultation on sample preparation in advance of your imaging session. Clients/users will be expected to prepare samples in a manner suitable for the instruments being used. If samples are presented in a form that requires extensive manipulation by the staff prior to being imaged, additional technical time may be billed. Lost instrument time is still chargeable. Users who require extensive sample preparation support should refer to the Dedicated Project Support option (section 1-1).
- b. **Instrument Training**-- Training sessions will not be offered to new users until orientation and submission of relevant safety documentation has taken place. New users should not expect to obtain images of their own samples until the end of the initial training session. We will train up to two people at once to reduce costs, but we need time for each user to try operating the instrument so we discourage group training.
- c. **Users may not train others** – Only persons trained by Integrated Microscopy staff are allowed to use equipment. Users are never allowed to train other users. Furthermore, users are not allowed to touch other equipment in the facility on which they have not yet been trained.
- d. **Training Costs**— Standard instrument use fees apply during training for all users including students. Training is provided free to all Western graduate and undergraduate students. All other trainees will be billed “technical time” at current rates for their training in addition to applicable instrument fees. Please refer to our fees policy document for further details.

- e. **Untrained & External Users**-- If an untrained client/user requires a Technical Specialist to operate the imaging instruments for them, an hourly technical fee is charged for this service. External users and Western University students who have not yet submitted all relevant Occupational Health and Safety Training certificates will be billed technical time for safety supervision.
- f. **Refresher Training**-- Trained clients/users who request refresher training will only be charged a fee for this service if requests are frequent or extensive. We prefer that users ask questions if they are unsure. Answering questions is always free.
- g. **Dedicated Project Support Services (Western Students Only)**—Students whose projects require extensive supervision by our staff for complex sample preparation and analysis techniques may be asked to apply for enrollment in our Dedicated Project Support Service (DPS). Each term a limited number of students may work in our facility under this program at a discounted technical support rate. Please ask for further information. DPS users still pay instrument time and still receive their equipment training free of charge.
- h. **Responsibility for Research Outcomes**-- The responsibility for research results and outcomes rests with the client. The IMB staff will advise users on experimental feasibility and considerations for good microscopy and analysis results, but the choice of experimental analysis, pertinent literature review, record keeping, data collection, analysis, and proper storage of images and files is the client's responsibility.

### 3. **Technical Assistance during Instrument Operation:**

- a. **New User Training (Level 0 Users)**— First time “NEW USER TRAINING” must be booked through our staff following orientation. Users may not book time for or train other users, or bring guests into the facility without staff supervision.
- b. **“I Require Assistance” (Level 1 Users)**-- After first-time training, inexperienced users are considered Level 1 and may not work alone in the facility. THESE USERS MUST BOOK TIME A MINIMUM OF 48 HOURS IN ADVANCE. Please either contact us directly to book time on a system OR refer to the Technical Specialist's calendar to select a time when he/she is available and indicate “I Require Assistance” when booking, so that we can ensure technical help is available during the session.
- c. **“I am independent” (Level 2 Users)**-- Level 2 Users have completed 2-3 solo session on the equipment and are working independently. If a user indicates on the calendar that they are independent, staff may take other appointments or leave the facility, and may not be available to help on demand.
- d. **“After-Hours Use” (Level 3 Users)**-- Usage outside of normal operating hours of 8:00 AM-5:00 PM is confined to users who have completed 8-10 independent sessions on our systems and proven competence. Only level 3 users may book time after hours. Users are expected to be fully independent and not require technical assistance. After-hours users must still book their time on the Calcium calendar. Unscheduled clients found using instruments after hours may be asked to leave.
- e. **External Users and those without Safety Training**— All users who are not members of the Western community and those Western users who are unable to provide proof of safety training must book time through our staff. These users will be billed for operator time + instrument time.

#### 4. Swipe Card & After-Hours Access to Facility

- a. **Types of Access**-- There are two types of access-perimeter access to the Biotron doors, and access to the Integrated Microscopy instruments in suite in room 105. Outside of the hours above, users/clients *may* be granted physical access to the building and facility at our discretion if the following standards are met.
- b. **Requests for Access**-- Requests for access must be made by the user's supervisor. Forms are available from the staff in the facility. Microscope Facility Access will be granted only to those Level 3 users able to demonstrate completion of the following UWO safety training:
  - i. WHMIS \*NEW\* Training
  - ii. Lab Safety and Environmental Waste Management
  - iii. BioSafety
  - iv. Worker or Supervisor Health and Safety Awareness
- c. **Categories of Access:**
  - i. **Regular Access** -- The microscope facility doors are normally open 8:30AM -4:30 PM Monday-Friday unless staff have been unexpectedly called away. Inexperienced users are not permitted in the facility when staff are unavailable. The Biotron perimeter doors attached to B&G/Materials Science are open Monday to Friday 8:30-5:00 PM. The lower Perth Drive doors are secured, but during business hours users may call staff using the phone provided in the entranceway. Any staff member listed by the phone can buzz them in through the doorway. All Biotron doors are monitored 24/7 by security cameras.
  - ii. **Biotron Perimeter Access**- After initial training, users may request Biotron perimeter door access, but this level of access does not include access to the Microscope Facility after-hours.
  - iii. **After-Hours Microscope Facility Access**-- Only experienced, independent users may request access to the Integrated Microscopy area outside of normal work hours. Request forms are available in the facility. This access is granted solely at our discretion. The supervisor must accept responsibility for the conduct of their trainees, and for any negligent damage to the equipment not covered by our service contracts.
  - iv. **Loss of Privileges**-- Access to the facility may be unilaterally terminated under the following conditions:
    1. Equipment or facility has been negligently damaged by the user.
    2. Normal operating procedures have not been followed.
    3. Hardware or parts have been moved without training and permission.
    4. Portable USB keys/drives have been used on the instrument computers.
    5. The equipment has been used for personal gain or for inappropriate activities.
    6. A user is found operating an instrument on which they have not been trained.
    7. A user accesses the equipment without logging their time for billing purposes.
    8. A user brings unauthorized persons into the facility without permission.
  - v. **Access Monitoring** --The Administrative Coordinator will maintain and monitor security records (video logs, card and key pads logs, instrument logs, etc.) to ensure proper security protocols are being followed within the facility.
  - vi. **Guests**-- Under no circumstances may any guests be brought into the facility off-hours without prior permission from the staff.