

EPR rules explained

Experimental Physics responsibilities (EPR)

Operational, maintenance and upgrade effort in CMS is shared among all its members as EPR. Each institute is requested to contribute an amount of EPR per year which is calculated based on the number of authors from that institute. The EPR duties per author are approved by the Management Board and Collaboration Board every year, for 2021 these are 4 months.

Engineers can also work for the EPR share of the institute without being author. Also technicians or non-doctoral students can perform EPR work for the institute. It is the responsibility of the institute to distribute the EPR due to the members of the group.

EPR contributions must be pledged at the beginning of the year in the EPR tool[🔗](#). Work will be approved by the corresponding project leaders once completed, at latest at the end of the year.

EPR and Authorship

General rules about Authorship and EPR are described in the CMS Constitution Annex 6, see CMS constitution[🔗](#).

The main EPR requirements to become regular author for new CMS members or members changing their status are:

- Candidates can become CMS author, if the waiting period of one year is over and if 6 months EPR contributions are delivered by the applicant.
- For 2021 the rule from previous years is still valid: if the home institution has contributed 100% of the EPR tasks due in 2020 applicants are assumed to have completed their EPR contributions for authorship, whereby the institute due is the sum over the EPR due of all authors in the institute.

This applies also to new CMS members from new CMS institutes.

The EPR document[🔗](#) describes the recent updates of these rules, it was approved in January 2021.

EPR task classification

From 2020 onwards, EPR work is based on thirteen projects and areas (ECAL, HCAL, HGCAL, MUON, TRACKER, BRIL, PPS, MTD, DAQ, L1 Trigger, Trigger coordination, PPD, Offline / Computing) plus a General category. EPR tasks are classified as:

1. **Member tasks**, they can be performed by any CMS member with the required skills.
2. **Qualification tasks**, they are designed to help new CMS members to meet their EPR commitments for the authorship application. They can only be pledged by new CMS members who apply for authorship, called authorship applicants for a maximum of 3 months. Qualification tasks are defined or redefined as such by the PM/AC in addition to the regular EPR task list, preferably for upgrade work. Pledging and approval is done in the regular EPR tool.
3. **Institute Responsibility tasks**: Important and ongoing EPR tasks can best be solved by a long-term commitment of one or more institutions to ensure stability and continuity. These tasks can be designated as Institute Responsibility Tasks (IR task) by the PM/AC after prior consultation with institutions willing to commit themselves. Only the Team leaders and PM/CA can pledge for the Institute Responsibility specifying the following:
 - the number of EPR months for the contributions
 - the institute members who will contribute to the task
 - a contact person for the IR task.
 The PM/AC approve IR tasks.

A commitment of the institute for three or more years is expected for Institute Tasks. The list of members and the number of months to pledge can be reviewed year by year. It may be terminated after consultation with the corresponding PM/AC and informing the engagement office.

EPR commitments of CMS institutes and members

For CMS Institutes, the annual EPR commitment (due) is the sum of the commitments of existing authors. CMS authors changing institutes are taken into account in the calculation of the institutes commitments (dues).

The commitment and work done of authorship applicants is accounted personally and separately from the institute / authors accounting.

The team leader is responsible for distributing the EPR work among the members of the team.

For Associated and Cooperating Institutes EPR contributions are encouraged but not required.

It is the responsibility of the institution's team leader to ensure that the EPR commitment (due) for their institute is met. The workload can be distributed among the team members. EPR work by engineers, technicians and others who are not authors will be counted towards the institution's EPR commitment (due).

EPR commitments for regular authors

As a regular author, a CMS member must make EPR contributions to enable the institute to fulfill EPR commitments and be covered by the M&O contribution of the home institute to maintain the authorship status. CMS Emeritus members qualify as authors but are exempted from financial and EPR commitments.

EPR commitments for new CMS members applying for authorship

To become a regular CMS author, a member must:

- be registered in CMS as scientist (physicist or engineer) or as doctoral student for at least 12 months and
- contribute the necessary EPR work to obtain authorship, which is currently 6 months. There is no time limit for this contribution.
Contributions from one calendar year before registration as scientist (physicist or engineer) or as doctoral student are counted for a maximum of 3 months.

If these conditions are fulfilled, the new member becomes a regular author if the M&O obligations are fulfilled and the team leader raises no objection.

New CMS members who should not become authors should be suspended. Suspended members have no EPR commitments (due), their EPR contributions are credited to their institute.

EPR reductions to account for special circumstances

The reduction of EPR tasks for an institute may be requested by the CBI or CBD by email to the chair of the Engagement Office.

- For **parental leave**, full time or part-time, a reduction of one yearly EPR due can be approved once per child and be spread over two calendar years (approved in CB 121, Dec 2018).
- For serious issues, like longer **illness** or similar, a reduction of one yearly EPR due can be approved. The request should be sent by the institute representative to the Spokesperson and the CB Chair to keep privacy. (approved in CB 121, Dec 2018)
- During the phase of the **writing of the PhD thesis** an EPR reduction of half of the yearly due can be approved and be spread over two calendar years (approved in CB121, Dec. 2018).
- For **authors**, who are **paid fully or partially with M&O A/B**, a reduction of the yearly EPR due can be approved pro-rata for the time registered to the institute and authorship (approved in CB 121, Dec 2018).
- No EPR credit is assigned for the coordination work of **L1 manager and POG/PAG conveners**. An

institute which could not achieve 100% of its EPR due, because of having L1 managers or L2 conveners in its group who was unable to contribute the individual EPR due, can request by the institute representative to the Engagement Office that the amount pro-rata to the duration of convener ship be credited to the L1 managers or L2 conveners, if the 100% is then accomplished. (approved in CB 123, April 2019)

The transition to these new rules

The EPR rules, specified in this document, were approved in a CB meeting on January 19, 2021, see <https://indico.cern.ch/event/993529/>.

2021 is a transition year from the previous EPR rules for authorship applicants.

For 2021 there is a choice between the old and the new rule, whichever is more advantageous.

In detail the following rules apply for 2021:

- applicants EPR due is no longer added to the institutes EPR due
- EPR contributed as non-doctoral student is accounted for authorship for existing applicants and non-doctoral students
- if the home institution has contributed 100% of the EPR tasks due in 2020 applicants are assumed to have completed their EPR contributions for authorship.

In 2022 the rules specified in this EPR document [apply](#).

-- ArchanaSharma - 2024-02-09

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Topic revision: r9 - 2024-02-09 - ArchanaSharma



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