

International Scholar Dossier (ISD) HR Manual



UC San Francisco

Providing the highest quality of service in areas that support the social, cultural and immigration needs of the international community at UCSF.

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Introduction

Welcome to ISD!

ISD is a database system shared between the International Students and Scholars Office (ISSO), Human Resources (HR) and prospective international scholars at UC San Francisco. It is used to gather required information about the international scholar's program in order to create the visa documents.

The Request Process

After being invited by the UC San Francisco HR representative, ISD allows the international scholar to electronically submit preliminary information to HR. HR reviews the data entered by the scholar, completes the appointment information, and uploads the required attachments. HR then electronically submits the request to ISSO. ISSO processes the application and mails the legal documents accordingly. Alternatively, HR can enter all data without giving scholars access to ISD.

Electronic Records, Documents

ISD allows for not only the transmission of data, but also the inclusion of attached documents in a variety of formats including MS-Word, PDF files, etc., eliminating the need to submit paper documents. The required documents will be uploaded in to the scholar's record prior to submission to ISSO.

Updated Fee Form and FedEx charges

Effective March 17, 2014, ISSO will no longer accept checks for recharge fees. Recharge fees will be paid using the Department's speedtype or chartstring listed within the Updated Fee Form. HR will enter the speedtype or chartstring into the ISD Appointment Tab. Federal Express (FedEx) accounts are not requested within the Updated Fee Form. The new fiscal year begins July 2014; at that time, FedEx fees will be built into recharge fees. An updated ISSO Fee Form will be distributed at that time reflecting these changes.

ISD Access

ISSO has granted ISD access to HR representatives based on HR Academic Manager approval. If you have already been assigned an ISD login, but you misplaced your login name or password, contact the [ISSO Data Coordinator](#) to locate your username, reset your password, or reset your account if you have logged in using the incorrect password too many times. Usernames are the first letter of your first name, followed by your last name (i.e. Kevin Long = KLong).

If you are a new HR representative and have never received an ISD login, request that your Academic Manager send an email to your [ISSO Adviser](#) to assign you ISD access. Be sure that the email includes the name(s) of any HR representatives who no longer need ISD access.

Service Centers and ISD Records

HR representatives only have access to view records for scholars within their own Service Center. If HR needs access to a UCSF scholar's record in a different Service Center (i.e. transfer of Department request), please contact the [ISSO Data Coordinator](#).

A Special Thanks to the UC Berkeley International Office

We would like to recognize and thank our colleagues at the UC Berkeley International Office, especially Sook Hollingshead, for creating the original version of this manual. UC Berkeley has been a tremendous source of support in UCSF's efforts to launch ISD.

The ISD Process: An Overview

This overview is a quick reference to get you started with ISD. Detailed instructions for each step follow in this Manual.

1. HR Logs in to <https://hr.isd.ucsf.edu:8080>.

Your Username and password are provided in an email sent to you by your ISSO Adviser. After logging in for the first time, click on “My Account” (top right of welcome page) and change your password and security question to something easy to remember.

2. HR creates shell of scholar record, and invites the new scholar to ISD:

- Click **Search for Visitor** from the Record Manager on the top left of ISD to see if the visitor is already in the database.
- If visitor is not in database, click **Add Visitor** from the Record Manager on the top left of ISD. Enter required information including the scholar Name (last name in ALL CAPITAL LETTERS), Email, and Username (must be lastnamefirstname with no spaces, commas or capital letters- i.e. longkevin), and determine Visitor Permissions. If there is a duplicate record, do NOT add the scholar; rather, email the [ISSO Data Coordinator](#) with the passport name of the scholar, their date of birth, the scholar’s current email address, and the name of the host department. ISSO will advise you on how to proceed.
- If you will have the scholar enter information into ISD, click **Tasks** on the ISD Action Bar, then click **Invite Visitor**. This will allow you to compose an email which will be sent to the scholar along with their login information. Copy yourself on this email so that you can help the scholar if s/he has trouble logging in. Click “Send”. If the HR representative prefers to enter all of the scholar’s info, do not click **Invite Visitor**. Rather, set the Visitor Permissions to **None** when adding the visitor and skip to step 4.

3. Scholar inputs information:

- Uses the login information provided from email sent by the system (#2 above).
- Uploads all required documents.
- Submits the information to HR.

4. HR reviews scholar information and completes data entry:

After the scholar has entered his/her required data and submitted it, the processing stage will be “Pending Department Review.”

- Review the scholar’s information for completeness and accuracy.
- Complete any missing information that is HR-specific, including the appointment, site of activity, and funding information.

5. HR uploads required documents:

- Pull up documents submitted through SRS ticket system and scholar’s ISD record.
- Bundle attachments from both systems into one document.
- Upload one attachment with all documents into ISD.
- Delete duplicate attachments, and attachments that ISSO does not require

6. Add a note for ISSO:

From the ISD Action Bar, add a **Note** to communicate with ISSO Advisers. For example,

- Indicate if you would like to pick-up the legal documents (rather than have them mailed to scholar).
- List previous conversations of importance between you and Adviser regarding the case.
- *Scholars do not have access to the **Note** section.*

7. Submit to ISSO:

- From the ISD Action Bar click **Tasks**
- Click **Review and Submit Visitor’s Information**. Click “Submit”. The processing stage will become “Submitted to International Office.”

8. ISSO processes request:

Requests will be processed within 10 business days from the date that a *complete* request is submitted. ISSO will contact HR during that time period if there is any missing information.

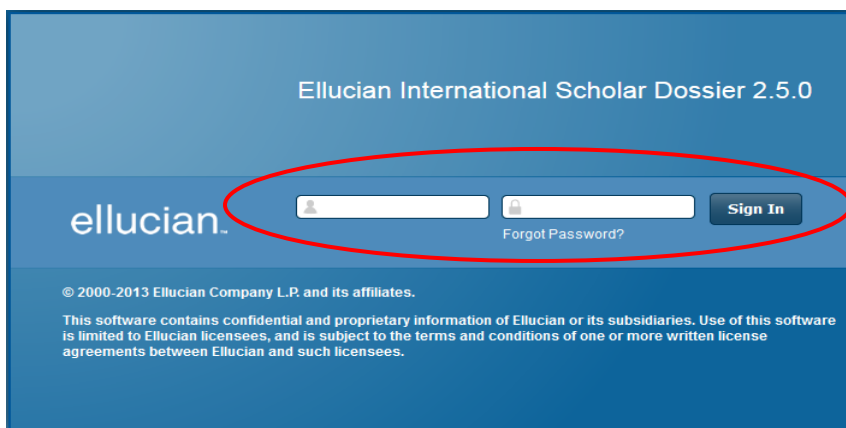
Tips for success

- **Browser Compatibility.** ISD is compatible with Internet Explorer version 8.x and above, and Mozilla Firefox version 3.5.x and above. Use of other browser software (Safari, Google Chrome, etc.) may cause errors.
- **Change Password.** After logging in for the first time, click on **My Account** (top right of welcome page) and change your password and security question to something that you will remember. If you forget your password or username, contact your HR Academic Manager to locate this information for you.
- **Duplicate Records.** When adding a new record to ISD, if a record appears to the system as duplicated, you will be brought to a screen that reads “**The following record already exists in the ISD database that might be a possible match with the visitor that you're trying to add.**” If this happens, DO NOT SELECT CONTINUE. This will cause more work and may cause technical problems. Rather, please hit cancel, email the [ISSO Data Coordinator](#) with the passport name of the scholar, their date of birth, the scholar’s current email address, and the name of the host department. Your ISSO adviser will let you know how to proceed.
- **Save Each Section.** Click “Save” after completing each Tab. After 15 minutes of inactivity, ISD will automatically time out and will not save your information unless you have previously clicked **Save**. Please note that all required fields within a Tab must be complete in order for the data to be saved. If you partially complete required fields within a tab, the data will not save.
- **Required Fields.** Fill in all required fields marked with a red asterisk (*).
- **Visitor vs. HR ISD URL.** The web page address (URL) for the scholars is not the same as the one for you. Do not send the scholar the web address that you use for ISD.
- **Scholar’s email.** Make sure that the email address of the scholar is correct. If it is not, the scholar will not receive necessary instructions and information.
- **Password Errors.** If a visitor is having problems logging in, the most common reason is a password error. The easiest way to avoid this is for the scholar to copy and paste the automatically-generated password from his/her invitation email.
- **Error Messages.** If you receive an error when submitting a record to ISSO contact the [ISSO Data Coordinator](#).

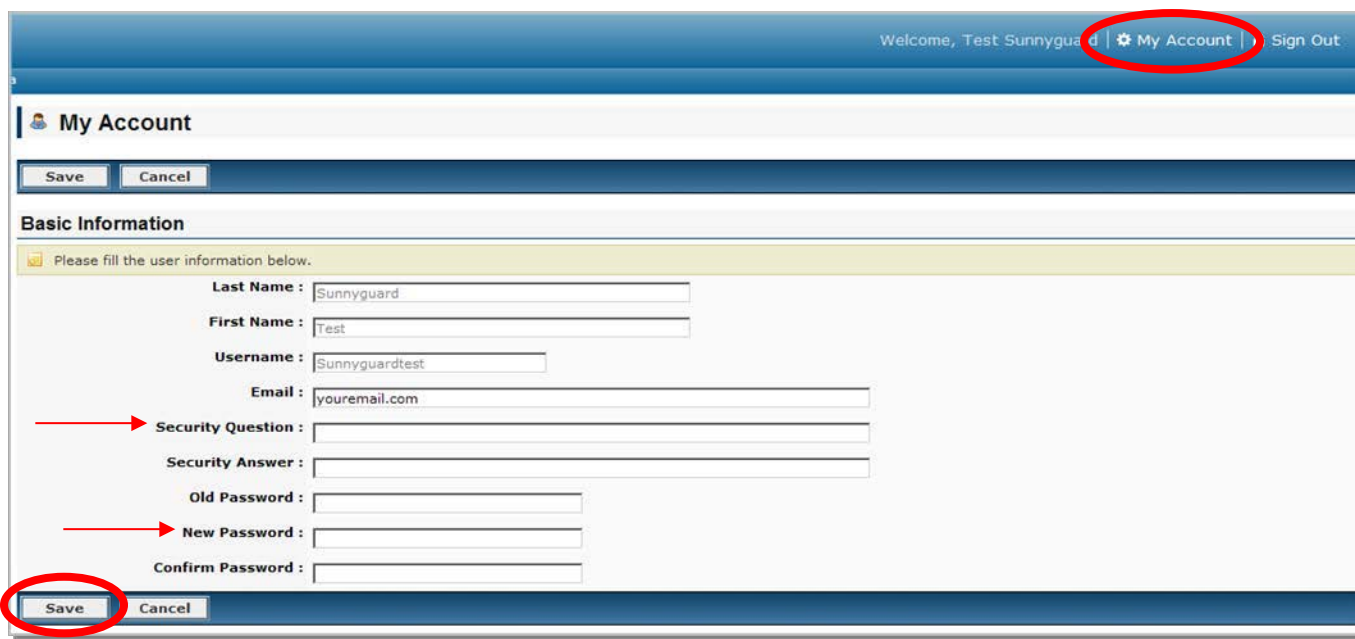
Logging In and Updating Your Password

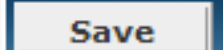
1. **Log in** to ISD with the username and password provided in the ISSO email sent to you. The HR ISD URL is <https://hr.isd.ucsf.edu:8080>.

Note: This URL is only accessible to HR representatives approved by your UCSF Academic Manager.
International scholars will use a different URL to access ISD.



2. Click on **My Account** (top right of welcome page) and change your **password** and **security question** to something that you will remember. The security question and answer you list will allow you to obtain your password if you forget it.
 - Contact your Academic Manager to regain access to ISD if you have lost your username, or if you have been locked out due to too many password attempts.



Click  before proceeding to the next Tab.

The Welcome Page

You will be directed to the Welcome Page once you have logged into the system.

UCSF HR Agreement for J-1 and H-1B Requests

It is important that you understand your UCSF responsibilities when inviting an international scholar. By submitting a J-1 or H-1B ISD record, the hosting HR representative confirms that the scholar meets the minimum eligibility requirements and confirms that they will work closely with respective Department administrators to comply with federal and institutional policies outlined within the UCSF HR Agreement.



International Scholar Dossier

UCSF HR Agreement

By submitting each request to UCSF's International Students and Scholars Office (ISSO), Human Resources (HR) certifies that all the information provided in the International Scholar Dossier (ISD) is true and accurate. Furthermore, HR agrees to comply with the federal regulations listed below, working with the Department where necessary.

J-1 Scholar Disclosures

Eligibility

- *English Language Proficiency: the scholar's English language proficiency is sufficient to participate in their program
- *Previous Participation: previous participation in a J-program has been listed in ISD and supporting documentation is submitted
- *Financial Support: the scholar has adequate funding (for self+dependents)- as defined on ISSO's website- to participate in their program
- *Late Arrival: HR will notify ISSO of delays in arrival that they are aware of within 24-48 hours of notice
- *Academic Appointment: the scholar will hold a UCSF academic appointment that they are qualified for

Visitor's Program

- *Objective: HR will notify ISSO of program objective changes that they are aware of prior to any change taking place
- *Insurance: HR will ensure the scholar maintains health insurance for their program that meets US Dept. of State requirements for J-1/J-2 visitors
- *Scholar's Welfare: HR will work with Department to monitor the scholar's progress and welfare, notifying ISSO if any assistance is needed
- *Extensions & Completions: HR will actively monitor scholar's end date and submit extension requests at least 2 months prior to program end date
- *Additional Program Changes: HR will notify ISSO of program updates prior to the change taking effect that include, but are not limited to: salary, anticipated employment, funding amount or source, work location, host department, biographical information (i.e. marriage, additional dependents, change of legal name or status), termination or withdrawal.

H-1B Disclosures

CAMPUS POLICY: Appointment must be academic and full-time (100%). Salary must be on scale with appropriate benefits.

PROCESSING TIMES: Government regulations require the submission of certain documents to the U.S. Department of Labor prior to submission of the H-1B petition to USCIS. Except in the case of H-1B extensions, amendments and transfers, the University can neither appoint nor pay the scholar until H-1B status is granted. Therefore, it is important that HR & departments submit a complete H-1B request to ISSO at least 3 months prior to the scholar's H-1B start date. Please note that the processing times of H-1B petitions is not guaranteed due to an incomplete H-1B request, government delays and/or changes in USCIS processing times. A premium processing fee of \$1,225, check payable to the Department of Homeland Security, may be required to expedite USCIS processing.

APPOINTMENT CHANGES: A material change in the terms or conditions of employment after approval of an H-1B petition may require the submission of a subsequent H-1B amendment petition

Searching for a Scholar's Record

To avoid creating duplicate records, search ISD to confirm that a record does not already exist for a scholar within your Service Center.

The search feature is also helpful if you need to return to a scholar's record in the future if you are unable to complete the data entry (and upload documents) in one sitting.

To search for a scholar's record:

1. **Log in** to ISD.
2. Select **Search for Visitor** (upper left side of screen).
3. In the **User** field, make sure **"All"** is selected. A list of all ISD records will appear under Search Results.
4. Click on the column header that you will conduct the search.
5. Locate the record you would like to open, and click on that scholar's name to access the record.
 - For example, to search by Last Name, click on "Last Name" in the column header. Click on the scholar's name. The scholar's record will open.

ISSO recommends searching according to the column header because you can still locate the scholar's record to complete the data entry if the last name is initially incorrectly spelled.

The screenshot shows the 'Search Visitor' interface. On the left sidebar, 'Search for Visitor' is circled in red. The main search form includes fields for Last Name, First Name, Campus ID, fsaScholar ID, Campus, Academic Department, ISSO Advisor, User (circled in red), Visitor Status, and Processing Stage. Below the form are 'Search' and 'Reset' buttons. The 'Search Results' section shows '# of visitor record(s) found: 57' and a table of results. The table header is circled in red, and the first row is highlighted. Red arrows point from text annotations to the 'Search for Visitor' link, the 'User' dropdown, the 'Last Name' column header, and the first name 'FloresTEST1' in the table.

Last Name	First Name	Academic Department	Campus ID	fsaScholar ID	Status	Processing Stage
FloresTEST1	ChrisTEST1	Neurology	FSx345	FS18	Active	Invited
FloresTEST3	ChrisTEST3	Biochemistry & Biophysics		FS19	Active	Invited
FloresTEST5	ChrisTEST5	Anesthesia		FS27	Active	Submitted to International Office

Adding a Visitor's Record

Create the shell of a scholar's record to initiate the request:

1. Click **Add Visitor** (upper left side of screen). Fields marked with a red dot are required.
2. Type **Last Name** in ALL CAPITAL LETTERS. For example, last name Long should be listed as LONG.
3. Type **First Name**, followed by any middle names in upper/lower case letters as appropriate.
4. **Middle Name** and **Campus ID** should always be left blank, unless otherwise noted by ISSO Adviser.
5. **Campus** should be "University of California, San Francisco." If not selected, Academic Department field will not populate.
6. **Academic Department** should be selected from the pull-down menu.
7. Scholar's Login Information: **User Name** for the Scholar always follows the **lastnamefirstname** sequence. No capital letters or punctuation marks. For example Kevin Long = **longkevin**.
8. **Email**: Confirm that the scholar's Email is correct. You will generate an email in ISD inviting the scholar to complete data entry. The email field for the invitation will be prepopulated with what is listed here. Scholar requests to reset passwords will also be sent to the email listed here.
9. Select **Read/Write** for the Scholar's Permission to allow the scholar to edit personal information in ISD. If you prefer to enter all of the scholar's information, set the permission to **None**, or **View**.

Add Visitor

Save Cancel Reset

Basic Information

Please fill the basic visitor information below.

Last Name : LONG • ← Last Name in ALL CAPS

First Name : Kevin Robert ← First Name & Middle Name Upper/Lower Case

Middle Name : *KEEP FIELD BLANK* ← Always Keep Blank

Campus ID : ← Keep Blank for Initial Requests.

Campus : University of California, San Francisco • ← Select UCSF

Academic Department : ← Select Hosting Department

Department User : [dropdown]

ISSO Advisor : [dropdown]

Login Information

The Visitor's email address is required prior to inviting the visitor to visit your International Scholar Dossier website and personal information. A password is automatically created and sent to the visitor when the invitation is sent.

User Name : longkevin • ← lastnamefirstname

Email : kevin.long@ucsf.edu •

Visitor Permissions

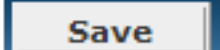
Below are the different permission levels available for visitor.

Read/Write (Visitor can modify personal information)

View (Visitor can only view personal information)

None (Visitor cannot log into International Scholar Dossier)

Assign Scholar Access


Click  before proceeding to the next Tab.

Duplicate Records

After saving the shell of the record, ISD will check if an ISD record exists in another Service Center with the same name that you have entered. A record may already exist if the scholar is currently at UCSF (extension cases, if the scholar is in a different department, if the scholar is currently in a different visa category), or if the scholar has been at UCSF in the past.

If a scholar with the same name appears, **Cancel** the request. **DO NOT SELECT "CONTINUE."** This would require unnecessary work on your part and could create data discrepancies.

Duplicates Record Found

 The following record already exists in International Scholar Dossier database that might be a possible match with the visitor that you're trying to add.

Attention	Last Name	First Name	Campus ID	Academic Department	Status
False	Nigorizawa	Hollyscholar			Active

Next, **send an email to the [ISSO Data Coordinator](#)** to request that the ISD record be transferred to you. It is likely that the record is currently associated with a different UCSF Department. Below are more detailed instructions.

What to do:

1. When you come to the **Duplicate Records Found** screen, click **Cancel**, and exit the record.
2. Email the [ISSO Data Coordinator](#) with the subject header "ISD record request for _____ (name of scholar)." In the text of the email include:
 - a) Passport name of scholar, with last name listed in ALL CAPS
 - b) Date of birth of the scholar
 - c) Current email address for the scholar
 - d) Name of the department/unit requesting the ISD record
 - e) Type of request: Indicate if the case will be for a new or continuing J-1 or H-1B request
 - f) Dates of appointment
3. Your ISSO Adviser will assign you access to the scholar's ISD record, and will confirm this with the HR representative via email. The Adviser will email with instructions on how to proceed.

Inviting a Visitor

After you have created a shell of the record, click on the **Tasks** tab in the ISD Action Bar and click **Invite Visitor**.

The screenshot shows the ISD system interface. On the left is a navigation menu with 'Home', 'Administration', and 'Record Manager'. The main area displays visitor information for 'Hollyscholar Nigorizawa'. Below this is a tabbed interface with 'Tasks', 'Notes', 'Documents', 'Forms', and 'History'. The 'Tasks' tab is active, and a list of tasks is shown: 'Invite Visitor', 'Edit Visitor Login and Permissions', 'Review and Submit Visitor's information', and 'Change Visitor's Department'. The 'Invite Visitor' task is circled in red, and a red arrow points to it from the right.

An email screen will appear with the scholar's email address prefilled. **Add your own email address in the "Cc:" field.** Enter text in email body, and click **Send**. (Sample invitation email p 29 – check with Academic Manager for approval of email text).

The screenshot shows the 'Invite Visitor' email composition screen. The 'To' field is pre-filled with 'holly.nigorizawa@ucsf.edu'. The 'Cc' field is highlighted with a red circle and contains 'HRrepresentative@ucsf.edu (cc Self)'. The 'Subject' is 'UCSF Invitation to Complete Application & Submit Visa Paperwork'. The 'Body' contains a detailed invitation message. At the bottom, the 'Send' button is highlighted with a red circle.

Clicking **Send** will send an email message to the scholar. The e-mail message will have two parts:

1. The first part will include everything you typed in the body of the message.
2. The second part will contain the login, password and the URL to the scholar section of ISD which was added automatically by the system.

Note that the ISD URL for the visitor is different from the one used by you. At this point, you have completed steps 1 and 2 on the Process Overview and can log out of the system unless you have additional scholars to invite.

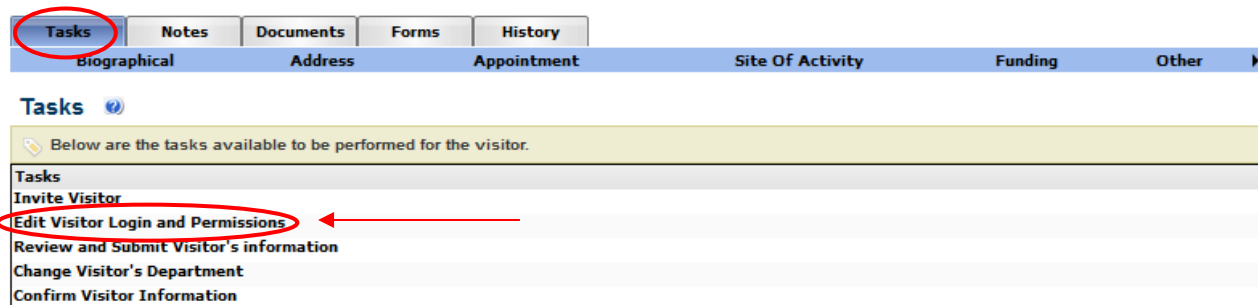
The screenshot shows the email body content. It starts with 'Dear Mr./Mrs. First Name LAST NAME,' followed by a congratulatory message and instructions. At the bottom, there is a red box highlighting the login information: 'Please use the below username and password information to login into the url specified', 'URL = https://scholar.isd.ucsf.edu:8081/Login.aspx', 'UserName = nhollyscholar', and 'Password = dCt!*'. A red bracket on the right side of this box is labeled 'Generated by ISD System'.

The scholar will now use this information to log in and complete his or her part of the process.

Editing Visitor Permissions

After the visitor has entered the required information, attached the required documents, and submitted the information to the HR Representative, HR must **edit the visitor's permissions to "none"**. This will prevent the visitor from altering information that has already been reviewed and submitted. To do this,

1. Click on the **Tasks** Tab in the ISD Action Bar
2. Click **Edit Visitor Login and Permissions**



3. Check the **None** box if scholar has submitted the completed request to HR (Scholar cannot log into ISD)
4. Click **Save**

Basic Information

Please fill the basic visitor information below.

Last Name : FloresTEST1

First Name : ChrisTEST1

Middle Name :

Campus ID : FSx345

Status : Active

Department User : Bunny, Bugs ← List Your HR Name Here

ISSO Advisor : Admin, Admin

Login Information

The Visitor's email address is required prior to inviting the visitor to visit your International Scholar Dossier website and personal information. A password is automatically created and sent to the visitor when the invitation is sent.

User Name : floreschris

Email : chris.flores@ucsf.edu

Reset Password : (Check this box if the visitor is locked out. Visitor will be unlocked and the password is sent to visitor at the email address listed above).

Visitor Permissions

Below are the different permission levels available for visitor.

Read/Write (Visitor can modify personal information)

View (Visitor can only view personal information)

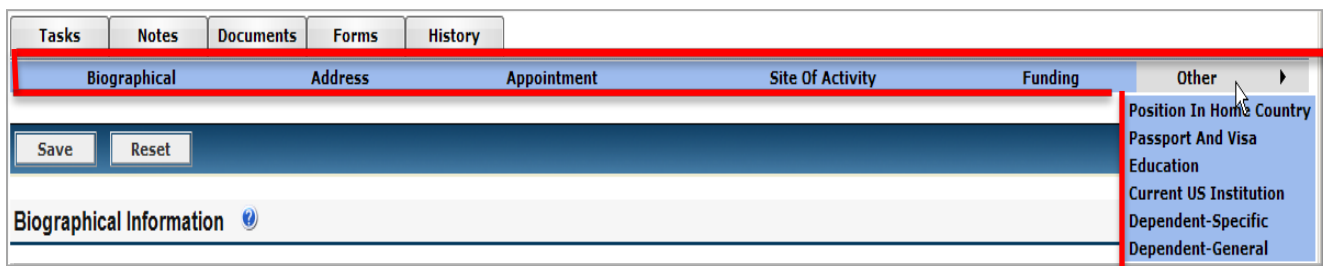
None (Visitor cannot log into International Scholar Dossier) ←

Click  before proceeding to the next Tab.

Editing and Updating Information in Tabs

There are 11 ISD Tabs that Require Data Entry:

1. Biographical
2. Address
3. Appointment
4. Site of Activity
5. Funding
6. Position in Home Country
7. Passport and Visa
8. Education
9. Current US Institution
10. Dependent-Specific
11. Dependent-General



HR Tabs vs Scholar Tabs

Scholars do not have access to all ISD Tabs that HR representatives have access to. If HR grants ISD access to scholars, the scholar completes information within tabs that they have access to, and HR completes information within the remaining tabs. HR is responsible for reviewing that all information is accurate before submitting the record to ISSO.

Tips for Successfully Navigating through Tabs

1. Click **Save** after completing all required fields within each Tab. If you move to the next Tab without completing all required fields within the current Tab, you will lose information.
2. Click **Save** at least every 15 minutes. The system will automatically log you out after this time period and you will be unable to regain data.
3. The system will *not* automatically take you to the following Tab once you have completed data entry within the current Tab and click Save. Manually click on each Tab to complete data entry.
4. Do not forget to complete the data entry within the “**Other**” Tab.
5. For J-1 scholars, be sure to complete the **Site of Activity** Tab.
6. For H-1B scholars, be sure to complete the “H Visitors Only” section in the **Appointment Tab**.
7. For recharge fees within the **Appointment** Tab, complete either all fields within the chartstring (with the exception of Activity Period and Flexfield), OR complete the speedtype.

Editing and Updating Information in Tabs (cont'd)

Biographical Tab

In most cases, the biographical information will be entered by the visitor.

Passport Name

Enter name **as it appears in passport** using the following rules:

- Use ONLY English characters (the English translation may be found on bar code of [passport biographical page](#)).
- Enter last name using all CAPITAL LETTERS.
- Do NOT use punctuation marks, accents, cedillas or combined letters (such as “æ”).
- Substitute a space in place of any hyphens (-).
 - For example, instead of “Françoise Bæder-Hoff,” type “Francoise BAEDER HOFF.”

Passport Surname/Last Name	<ul style="list-style-type: none"> ▪ Enter last name in all CAPITAL LETTERS.
Passport First Name	<ul style="list-style-type: none"> ▪ Include any middle names in this field, if applicable.

Birth Information

City of Birth	<ul style="list-style-type: none"> ▪ Indicate province if city is not known or not applicable.
Country of Citizenship	<ul style="list-style-type: none"> ▪ Select from drop-down list. ▪ If you have dual citizenship, select country which issued the passport you will use to enter the U.S.
Country of Legal Permanent Residence	<ul style="list-style-type: none"> ▪ The country where legal <u>permanent</u> resident status has been granted by the federal government of that country. ▪ You may or may not be currently living in the country of legal permanent residence.

Click  before proceeding to the next Tab.

Editing and Updating Information in Tabs (cont'd)

Address Tab

There are three address types. Click "Save" after entering each address. To update addresses, click **"Edit."**

1. Local Address:

- a. If scholar is **inside** the U.S., enter local U.S. street address on line 1. List the apartment # on line 2.
- b. If scholar is **outside** the U.S., and does not have a U.S. address, list the local street address where the work will be performed in line 1.
 "List UC San Francisco -- Department of XXX" in line 2.
 Do NOT include room numbers or building names in Line 1 or Line 2.
- c. List an **email** address that will be active while at UCSF. This may be a personal email address.
- d. Notify your [ISSO Scholar Adviser](#) if the J-1 scholar is currently within U.S. and applying for a change of status. *For H-1Bs, no need to notify ISSO if scholar's applying for a change of status within the U.S.
- e. Be sure to submit the [J-1 Transfer In form](#), if appropriate.

Local U.S. Address	Local <input type="radio"/>
Is this a Current Address?	Yes <input type="radio"/>
Local U.S. STREET Address	1450 Third Street
Local U.S. Address Line 2 (list UC San Francisco -- Dept of XXXX)	UC San Francisco -- Department of Medicine
U.S. City	San Francisco
U.S. State	CA
U.S. Zip Code	94143

2. Permanent Address:

- a. Is this a current address? **Make sure this states, "No,"** even if it is the current address.
- b. Enter the Permanent Address and Phone Number abroad. If there isn't a postal code, list "N/A."

Permanent Address Information

Save Reset

Permanent Address Fields Data

Is this a Current Address? **No** "No" must always be listed for Permanent and Mailing Address.

Notify **ISSO Adviser** if scholar is currently within the U.S. and will be applying for J-1 scholar status

Permanent Address

Permanent Address Line 1: erwe

Permanent Address Line 2 (if applicable):

Permanent Address City: werew

Permanent Address State (if applicable): ID

Province (if applicable):

Postal Code: werew

Country: Austria

Phone Number: 234324324324

3. Mailing Address:

- a. **Is this a current address?** Make sure this states **"No,"** even if it is a current address.
- b. Enter Mailing Address where visa documents should be sent. Leave section blank if legal documents should be mailed to Permanent Address.

Click  before proceeding to the next Tab.

Editing and Updating Information in Tabs (cont'd)

Appointment Tab

Most appointment information is self-explanatory. Please note that scholars do not have access to the Appointment Tab. HR will need to complete all fields.

1. **Appointment Start Date, Appointment End Date, UC Appointment Title.**
 - For H-1B Requests, enter desired visa request period (up to three years) in Appointment Start and End Date fields.
 - For J-1 Requests, only enter appointment dates where funding is currently guaranteed in the funding letter. For postdocs, this is generally for a one year period.
2. **J Visitor Category:** ONLY select "Research Scholar," "Short-Term Scholar" or "Professor." If an H-1B request, select "*Not Applicable." Click [here](#) for J-1 category info.
3. **"H Visitors Only":** Even though this section does not have red asterisks next to it, these fields are required to process H-1B Requests.

Appointment Information

Appointment Fields Data	
<p>Please keep the following in mind based on Request type:</p> <ul style="list-style-type: none"> • For H-1B Requests, enter desired visa request period (up to three years) in Appointment Start Date and Appointment End Date fields. • For J-1 Requests, only enter appointment dates where funding is currently guaranteed in the appointment letter. For postdocs, this is generally for a one year period. • For information on J-1 categories, click here. 	
School Name	School of Dentistry *
Department Name	Orofacial Sciences
Appointment Start Date (DD, MM, YYYY)	1 October 2014 *
Appointment End Date (DD, MM, YYYY)	30 September 2016 *
UC Appointment Title	Junior Specialist *
HR Representative Preparing Form	Aeris Wang *
Dept Chair Name	Deborah Greenspan *
Faculty Sponsor or P.I. Name	Ophir Klein *
Is appointment less than 6 months?	No *
If yes, is there a strong possibility program will be extended?	
J Visitor Category (only select Short Term Scholar, Research Scholar, Professor or *Not Applicable)	Research Scholar *
Brief, non-technical description of activity (If H-1B request, enter "N/A")	Research in Biomedical Sciences.
Post-Degree Experience Required (medical license, req'd years of experience in field, etc)	N/A *
Is the Position Full-Time?	Yes *
Is the Position Tenure Track?	No *
<p>Custom Appointment Information</p> <p>*For H-1B Requests, the following 3 questions are required.</p>	
<p>H Visitors Only Data entry required for H-1B requests, even though there are no red asterisks.</p>	
Work Sites (Street Address, City, State, Zip)	
Degrees Required for Position	

Editing and Updating Information in Tabs (cont'd)

Appointment Tab (cont'd)

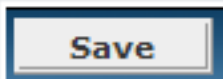
The **Custom Field section** requires the type of request, the scholar's primary activity and recharge information. Most fields are self-explanatory.

1. Primary Activity: Indicate if scholar's primary activity is research, teaching or both. If uncertain, please ask the Principal Investigator overseeing scholar's work. ISSO is unable to determine primary activity.
2. Recharge Information
 - a. List **Department Representative's** name who requested the visa (not the HR representative). ISSO's financial analyst will contact this Department rep to verify the recharge if necessary.
 - b. **Recharge Fields:** Complete with new chartstring OR speedtype. For chartstring, all fields are required with the exception of Activity Period and FlexField. Checks no longer accepted for recharge fees, effective March 17, 2014.
 - c. **FedEx Fees:** ISSO does not require FedEx account numbers, effective March 17, 2014. FedEx fees are built into the ISSO recharge fees.

Custom Fields Data	
Custom Appointment Information	
A. Type of Request	<input type="text"/> ← Select Type of Request
B. At UCSF, will scholar primarily be teaching, researching or both?	Research <input type="text"/>
C. Service Center	A <input type="text"/>
D. Dept Representative Who Completed Fee Form	Melinda Dahl <input type="text"/> ← Not HR Representative
E. Business Unit	<input type="text"/>
F. Fund	<input type="text"/>
G. DeptID	<input type="text"/>
H. Project	<input type="text"/>
I. Activity Period	<input type="text"/>
J. Function	<input type="text"/>
K. Flexfield	<input type="text"/>
L. SpeedType, COMPLETE THIS FIELD ONLY IF NO CHARTSTRING	DOFOPHIRPY <input type="text"/>

Enter Chartstring OR Speedtype.

For Chartstring, all fields are required with the exception of Activity Period and Flexfield.

Click  before proceeding to the next Tab.

Editing and Updating Information in Tabs (cont'd)

Site of Activity Tab ****If H-1B Request, designate "N/A" in these fields.**

Tasks	Notes	Documents	Forms	History	
Biographical	Address	Appointment	Site Of Activity	Funding	Other

Site Of Activity

Add New

This tab lists the visitor's site of activity information.

Site of Activity Name	Site Address	Primary Site
UC San Francisco -- Parnassus Campus	513 Parnassus Avenue, HSE 1508 Department of Orofacial Sciences San Francisco, CA 94143	yes

1. Click **"Add New."**
2. Select **"Yes"** for scholar's primary site of activity.
3. In Site of Activity Institution, list "University of California, San Francisco – XXXX Campus" (if activity will take place on campus).
4. In Site STREET Address Line 1, enter the street address where the research/teaching will take place. ***Do not include the office number, room number or building name in Line 1 or Line 2.**
5. In Site of Address Line 2, enter the name of the hosting department or research unit.
6. Click **Save**.
7. If there will be multiple sites of activity, click **"Add New"** to add a new site of activity.

▼ J Visitors Only

Primary Site: **Yes**

Site of Activity Institution (UC San Francisco -- XXXX Campus): UC San Francisco -- Parnassus Campus

Site STREET Address Line 1: 513 Parnassus Avenue

Site Address Line 2 (Dept of XXXX): Department of Orofacial Sciences


City: San Francisco

State: CA

Zip Code: 94143

Custom Fields Data: No Custom Fields Found

Save | Reset

Click  before proceeding to the next Tab.

Editing and Updating Information in Tabs (cont'd)

Funding Tab – ****Only Complete this Funding Tab for J-1 Scholar Requests.**

Although fields within the Funding Tab do not have red asterisks by them, completing this Tab and uploading proof of funding is required to issue J-1 legal documents. Scholars do not have access to this Tab.

1. All dollar amounts must be entered without commas or periods, and should be rounded to nearest whole dollar (for example, \$15,459.87 should be entered as 15460).
2. Funding must cover the start date through end date on the Form DS-2019.
3. All funding must be translated into English, converted to U.S. dollars, and dated within the last six (6) months. You can convert funding at www.xe.com.
4. See [ISSO website](#) for minimum funding requirements for J-1 scholars and dependents.

See field-by-field instructions and documentation requirements in this table:

Heading	Field name	Instructions	Additional documents to be uploaded:
Program Sponsor Funds	UCSF Funds (UCSF issues check)	Enter total amount of funds the scholar will receive from a UCSF source, including salary, grant, honorarium, per diem or endowment.	The signed appointment letter with appointment dates, salary, percentage, and title must be uploaded.
US Government Organization Funds	U.S. Government Funds	Enter total amount of funds the scholar will receive from a U.S. government source. Select U.S. government funding source from drop-down menu. If source is not listed, type the name in.	Official award letter/document on letterhead with amount, dates, and any other parameters of the agreement. If amount is given in a foreign currency, include a conversion.
Government Funds	Government Funding Abroad	Enter total amount of funds the scholar will receive from government agency abroad.	Official award letter/document on letterhead with amount, dates, and any other parameters of the agreement.
	Name of Government Funding Agency Abroad		If amount is given in a foreign currency, include a conversion.
Other Organization Funds	Other Organization Funds	Enter amount of funding supplied by an outside source, such as the scholar's employer or a third party organization.	Official award letter/document on letterhead with amount in US Dollars, dates, and any other parameters of the agreement. Please note: we do <u>not</u> accept pay stubs as the sole proof of funding.
	Name of Organization		
Personal Funds	Personal Funds	Enter total amount of funds from the scholar or private individual's personal funds.	Upload bank statement as well as Letter of Guarantee if funding is from a source other than the scholar. Letter should include scholar's name, amount given, date and signature.
	Sponsor's relationship to scholar, is applicable (i.e. parent, spouse, etc.)		

Editing and Updating Information in Scholar Tabs (cont'd)

Other: Position in Home Country Tab (Input Data for J-1 scholars; Designate "N/A" if H-1B Request)

1. If scholar has not already done so, indicate:
 - a. Scholar's **Position** in Home Country in **1-3 words**.
 - **IMPORTANT: If a student, indicate "Undergraduate Student" or "Graduate Student."**
 - b. Employer/institution name (no need to list Department).
2. Indicate **Name of Institution** where position is held (do not list scholar's Department).
3. **Employer Type:** Only select from options available (educational, private, city or government institution, or other).

Other: Passport and Visa Tab

Most fields are self-explanatory, and the scholar may have already completed these fields. Before submitting to ISSO, HR must complete/verify the information.

1. **Requesting a change of status within U.S.?:** If scholar is requesting to change status from another visa classification to J-1 within the U.S., consultation with an [ISSO Scholar Adviser](#) is required to discuss the process at least four (4) to six (6) months prior to the start date.
2. **Transferring to UCSF from another U.S. University?** If yes and a J-1 scholar, ISSO J-1 [Transfer In Form](#) must be uploaded to **Documents Tab** to process request.
3. **Currently subject to 2-year (212e) home country residency requirement?** If scholar has never been in the U.S. in J status, has never been subject to the 2-year (212e) residency requirement, or has received a waiver of the requirement indicate "No".
4. **Been in J-1 or J-2 status within past 24 months?** If scholar has been in the U.S. in J-1 or J-2 status within past 24 months, upload copies of most recent DS-2019 form in the **Documents Tab**. If this is a repeat visit and you have questions about the scholar's eligibility for J status or H-1B, contact your [ISSO Scholar Adviser](#).
5. **Received a waiver of 2-year (212e) home country residency requirement from the U.S. Department of State?** If scholar has never been in the U.S. in J status, has never been subject to the 2-year (212e) residency requirement, or has never received a waiver recommendation, enter "no". If scholar has applied for a waiver of the 2-year home country residency requirement and has received a waiver recommendation from the U.S. Department of State, indicate "yes," and attach approval letter.
6. The **Prior Visa History** section determines eligibility for visa status.
7. **H-1B Requests:** Complete all fields within "[H Visitors Only](#)" header, and "[Custom Passport and Visa Information](#)" section.

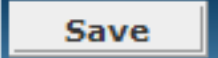
Other: Education Tab

If submitting a J-1 request and scholar has an MD or DDS, attach **statement of no patient contact** in **Documents Tab**. The remaining data fields are self-explanatory.

Other: Current US Institution, Dependent – Specific and Dependent – General Tabs

The data fields in this section are self-explanatory.

***Note:** If adding a dependent after the J-1 scholar has arrived, enter data in appropriate tab and upload marriage certificate, passport and funding document (if appropriate) into ISD. Note that the J-2 email address is required in the Notes tab.

Click  before moving between Tabs.

Attaching Documents

Before submitting an ISD record to ISSO, all required documents must be uploaded. Please note the following:

- **Bundle all documents into one attachment.**
- Attachments cannot be larger than 4MB.
- You cannot add more than 100MB of files at one time.

To reduce a PDF file size, click on > File > Save As Other > Reduced Size PDF > Select the latest Acrobat version

The following are acceptable file formats:

- Bitmaps (*.BMP)
- Compuserve Graphics Image Files (*.GIF)
- Adobe Acrobat files (*.PDF)
- Excel spreadsheets (*.XLS)
- Microsoft Word documents (*.DOC)
- JPEG files (*.JPG)
- Text files (*.TXT)

J-1 Required Documents ***H-1B required documents on p 22-23.**

If designated with asterisk (*), UCSF Department is responsible for submitting document through SRS.

Standard Initial J-1:

- *Certification of English Language Proficiency, including appropriate supplemental documentation
- *Curriculum Vitae
- *UCSF Offer Letter (using updated template)
- *No Patient Contact Letter (if scholar holds MD, DDS or equivalent)
- Passport for J-1 (and J-2s, if applicable)
- DS-2019 forms issued in previous 24 months, for prospective J-1 scholars and J-2 dependents
- If applicable, Financial Support Documentation
- If applicable, certification of legal permanent residence (if other than country of citizenship)
- If applicable, Department to Department Transfer letter (if transferring between UCSF departments)

Extensions:

- *UCSF Offer letter (using updated template)
- Financial Support Documentation, if funding is from an institution other than UCSF
- J-1 and J-2 passports, if renewed since initial start date

Transfer in J-1:

Standard initial documents, plus:

- I-94
- J-1 visa stamp (if applicable)
- Most recent DS-2019
- COMPLETED ISSO Transfer-in form

Change of Status from F-1 OPT to J-1:

Standard initial documents, plus:

- EAD card
- Page 3 of OPT I-20

H-1B Documents Required from HR & Department

CAMPUS POLICY: Appointment must be academic and full-time (100%). Salary must be on scale with appropriate benefits.

PROCESSING TIMES: Government regulations require the submission of certain documents to the U.S. Department of Labor prior to submission of the H-1B petition to USCIS. Except in the case of H-1B extensions, amendments and transfers, the University can neither appoint nor pay the scholar until H-1B status is granted. Therefore, it is important that HR & departments submit a complete H-1B request to ISSO at least 3 months prior to the scholar’s H-1B start date. Please note that the processing times of H-1B petitions is not guaranteed due to an incomplete H-1B request, government delays and/or changes in USCIS processing times. A premium processing fee of \$1,225, check payable to the Department of Homeland Security, may be required to expedite USCIS processing.

APPOINTMENT CHANGES: A material change in the terms or conditions of employment after approval of an H-1B petition may require the submission of a subsequent H-1B amendment petition to USCIS.

ISD SUBMISSION BY HR: Log in to ISD, enter or update required data fields and upload a PDF scan with the below documents, except filing fee checks. The filing fee checks must be requested by the department in Bear Buy with instructions to be sent to the ISSO at campus box 0477.

DHS FILING FEE CHECKS: Department logs in to BearBuy and request checks payable to “Department of Homeland Security” at USCIS California Service Center, 24000 Avila Road, Laguna Niguel, CA 92677. Do not send checks to Immigration. Add instructions for the Controller’s office to send original checks to the ISSO office at campus box 0477.

<input type="checkbox"/> Export Control Attestation	· Signed by faculty sponsor
<input type="checkbox"/> Appointment or Offer Letter	· UCSF appointment dates may be shorter in length than H-1B visa request dates
<input type="checkbox"/> DHS Filing Fee Checks (instructions above)	· \$325 filing fee (required) · \$500 anti-fraud filing fee (required for initial H-1B & transfer of H-1B status to UCSF) · \$1,225 premium processing fee (optional)
<input type="checkbox"/> H-1B Support Letter	· Printed on UCSF letterhead & signed by department chair
<input type="checkbox"/> Actual Wage Memorandum	· Signed by HR or department representative
<input type="checkbox"/> Notice of Intent (if applicable)	· Not required if H-1B position is union-represented (i.e. Postdoctoral Scholar) · Post in two conspicuous locations for each worksite location · Post for ten consecutive business days for each worksite location · Prepare multiple Notice of Intent forms for each worksite location · Signed by HR or department representative
<input type="checkbox"/> H-1B Addendum	· Signed by department chair

H-1B Documents Required from Scholar

TRAVEL ADVISORY: ISSO strongly discourages traveling in and out of the U.S. while an H-1B petition is pending approval with USCIS. Under certain circumstances, traveling on another visa status or a previous H-1B record may jeopardize the approval of H-1B status. Please discuss your concerns about traveling abroad with the ISSO office.

H-1B EXTENSION AND/OR AMENDMENT: Only documents with an asterisk (*) below are required. It is not necessary to resubmit the other listed support documents that ISSO should already have on file.

ISD SUBMISSION: Log in to ISD, enter or update required data fields and upload a PDF scan with the below documents.

<input type="checkbox"/> Passport Page(s) *	· Most recent passport biography page(s) with date of expiration shown
<input type="checkbox"/> Degree, Diploma or Certificate	· Degree, diploma or certificate as proof of completion
<input type="checkbox"/> Certified Translation of Degree (if not in English)	· Documents in a foreign language must be submitted with an English translation · The translation can be done by anyone other than the applicant or family member · Include the following statement with translator's signature, "I, [name of translator] certify that I am fluent in [foreign language] and English, and the attached translation is complete and accurate to the best of my knowledge."
<input type="checkbox"/> Academic Equivalency Evaluation	· A general or basic evaluation of a non-U.S. degree is recommended · See NACES Members at http://www.naces.org for options on evaluation services
<input type="checkbox"/> Medical License * (if applicable)	· If position involves incidental patient care, include a valid license with California Medical Board, 2113 certificate or 2168 certificate
<input type="checkbox"/> Curriculum Vitae	· CV with list of publications
Include any of the below if currently in the U.S. in a non-immigrant visa status (F, H, J, L, O, TN status, etc.), otherwise skip	
<input type="checkbox"/> Visa Stamp(s) *	· All prior U.S. visa stamps issued by a U.S. embassy
<input type="checkbox"/> Most Recent I-94 Record *	· See http://www.cbp.gov/i94 for your most recent I-94 admissions record
<input type="checkbox"/> Form I-797(s)	· All prior I-797 approval notices, if previously held H, L, O or TN status
<input type="checkbox"/> Form I-20(s)	· All prior I-20 forms, if previously held F status
<input type="checkbox"/> Form DS-2019(s)	· All prior DS-2019 forms. if previously held J status
<input type="checkbox"/> Waiver of 2-year Requirement (if subject to section 212(e))	· If in J status and subject to the two year home residency requirement, provide either U.S. Department of State (DOS) Advisory or Recommendation Letter to waive requirement, and/or Form I-612 Waiver Approval Notice issued by USCIS
<input type="checkbox"/> Employment Authorization Card	· If previously held F-1 OPT, J-2 or L-2 status
<input type="checkbox"/> H-4 Dependent Application * (if applicable)	· Original Form I-539 (http://www.uscis.gov/i-539), completed & signed by dependent · \$290 filing fee check payable to "Department of Homeland Security" · Dependents' passport, visa, I-94, I-797, I-20, DS-2019, marriage and/or birth certificate.

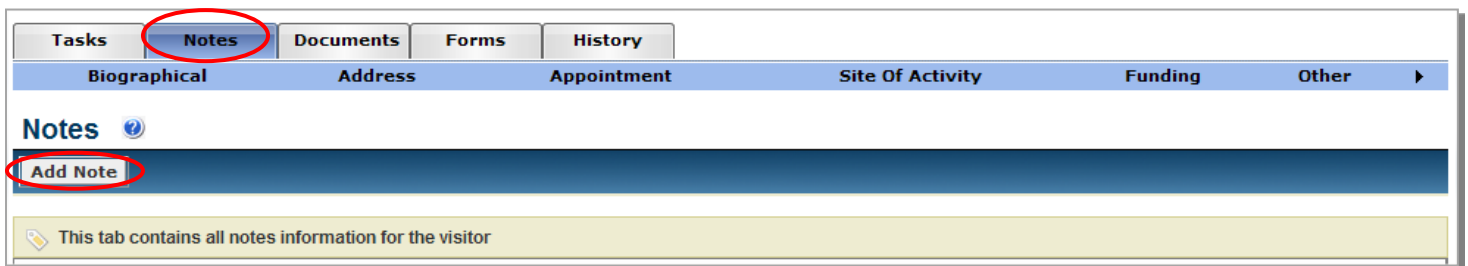
Adding Notes

From the **Notes** Tab, Click **Add Note**. In the Subject, indicate the type of request you are submitting.

Enter a **NEW NOTE** for each message that you would like Scholar Advisers to review.

The Notes tab is used:

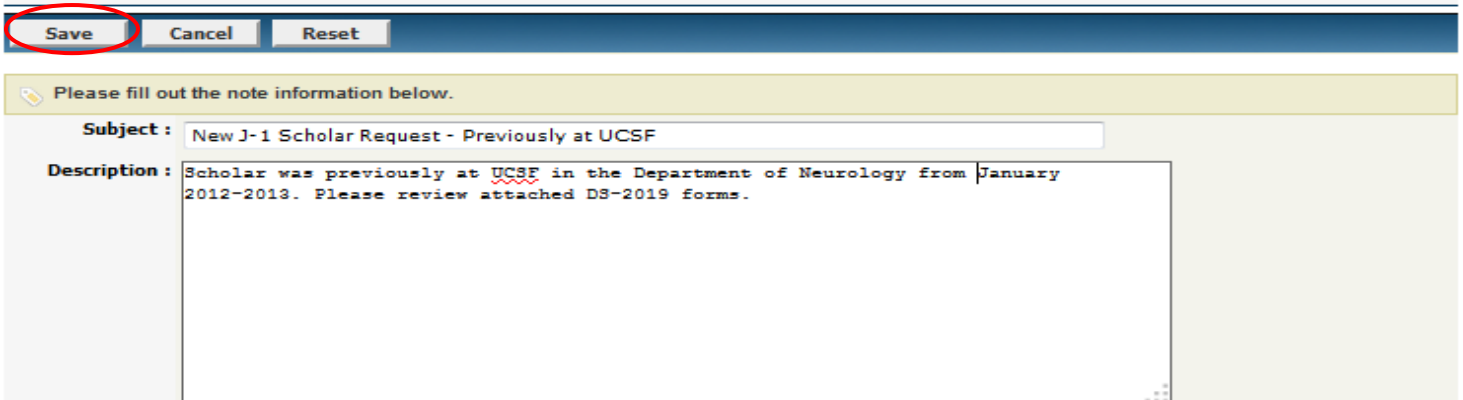
- to notify ISSO if the scholar has previously been at UCSF
- to notify ISSO if a special case, such as transfer or change of status
- to specify special mailing instructions (if other than standard FedEx mailing)
- to add comments about the scholar's case (i.e. if resubmitting request due to amendment)
- to specify if an ISSO member has already been involved in the case



If the scholar is currently in the U.S. and will be traveling internationally, add a note with travel information. If there is any additional information you would like to include about this scholar include this in the description as well.

Add Note

Basic Note Information

A screenshot of the 'Basic Note Information' form. At the top, there are three buttons: 'Save', 'Cancel', and 'Reset'. The 'Save' button is circled in red. Below the buttons, there is a yellow box with the text 'Please fill out the note information below.' Below this, there are two fields: 'Subject' and 'Description'. The 'Subject' field contains the text 'New J-1 Scholar Request - Previously at UCSF'. The 'Description' field contains the text 'Scholar was previously at UCSF in the Department of Neurology from January 2012-2013. Please review attached DS-2019 forms.'

Review and Submit Process

1. Click on **Tasks**
2. Click **Review and Submit Visitor's Information**
3. For **Profile Status**, select Pending if an H-1B request, SEVIS-Active if a J-1 Extension, or SEVIS-Pending if a new J-1 request.
4. Check that the correct **Profile Type** is selected (J-1 or H-1B) and update if needed. The **Profile Subtype** should always be "Scholar"
5. If all information is correct, click **Submit** button. This will send the information to ISSO for processing.
6. You will know that the record has been submitted because the processing stage will say "**Submitted to International Office**" and a message will inform you that the "**Record was sent to fsaATLAS.**"

Processing Stage : Submitted to International Office

Tasks | Notes | Documents | Forms | History

Biographical | Address | Appointment | Site Of Activity | Funding | Other

Review and Submit Information

Submit

Record was sent to fsaATLAS.

Please carefully review all information and select the appropriate Profile Status, Profile Type and Profile SubType for this visitor. All required fields must be completed. Click Submit to send this visitor's information to the international office.

Profile Status: SEVIS - Pending | Profile Type: J-1 | Profile Subtype: Scholar | Profile Subtype If Other: []

Update As Appropriate

7. In the Review and Submit screen, you can also **Expand All** ISD fields prior to submission to confirm that data is entered correctly.
8. If information is missing, the submission will not go through. The missing fields will be noted in red along with the corresponding Tab.
9. Complete the missing information and then review and submit the record.
10. An ISSO Adviser will contact you if there is any additional information required.

Review and Submit Information

Please fill all the required fields listed below before you submit your information. The Submit button will be unavailable until all the required fields are filled.

- Location of Appointment in (Appointment Tab)
- Appointment Start Date (enter month and year first, and day last) in (Appointment Tab)
- Appointment End Date (enter month and year first, and day last) in (Appointment Tab)
- Appointment Title in (Appointment Tab)
- Department Chairperson in (Appointment Tab)
- Faculty Sponsor or P.I. in (Appointment Tab)
- Is appointment less than 6 months? in (Appointment Tab)
- J-1 visitor category (only select either Short-Term Scholar or Research Scholar) in (Appointment Tab)
- Subject field code in (Appointment Tab)
- Field of Research or Teaching at UC Berkeley in (Appointment Tab)
- Primary UC Berkeley Activity (Research or Teaching) in (Appointment Tab)
- Is the position tenure track? in (Appointment Tab)
- Is the visitor currently enrolled in a degree program? in (Education Tab)
- Does the scholar have a medical degree(M.D.)? in (Education Tab)
- List degree, field, and institution for all university degrees earned in (Education Tab)
- Visa Sponsorship in (Passport And Visa Tab)
- Passport Expiration Date in (Passport And Visa Tab)
- Passport country in (Passport And Visa Tab)
- Is the scholar currently in the US? in (Passport And Visa Tab)
- Is the scholar requesting a change of status? (i.e. F-1 to J-1) in (Passport And Visa Tab)
- Has the scholar been in any category of J status in the last 2 years? in (Passport And Visa Tab)
- Has the scholar ever received a waiver recommendation from the U.S. Department of State? in (Passport And Visa Tab)
- Has the scholar ever been to the US in H-1 status? in (Passport And Visa Tab)
- Does the scholar have a petition for U.S. permanent residency(green card) pending? in (Passport And Visa Tab)
- Position or Occupation in Home Country in (Position In Home Country Tab)
- Employer or institution for above position in (Position In Home Country Tab)

Requesting an Extension

Based on the ISD search results (p 8 and p 10), HR will submit an extension request using one of the following three methods:

1. **If an ISD record already exists and you have access to the scholar's record**, pull up the scholar's record and update data based on guidance below.
2. **If an fsaATLAS record already exists, but you do NOT have access to the scholar's record** (i.e. the scholar does not yet have an ISD record, or the scholar is affiliated with another Department), email the [Data Coordinator](#) with the passport name of the scholar, UCSF program dates, their date of birth, the scholar's current email address, and the name of the host department. ISSO will email you to let you know when they have assigned you access to the scholar's record. Then, complete data entry based on guidance below.

If the scholar already has an ISD record, and you have access to it:

1. **Pull up the visitor's record** (see p 8)
2. **Appointment Tab:** List the original UCSF start date within the Appointment Start Date field. **Do NOT list the extension start date as the Appointment Start Date.** Update the end date as appropriate.
3. **Complete remaining ISD Tabs** as appropriate, making sure to update scholar's local address and email.
4. **Funding:**
 - **FOR J-1 CASES:** Update funding with the cumulative total for the entire J program to the nearest dollar. For example, if the scholar provided personal funds of \$19,200 for the first year, and is showing personal funds of \$19,200 for the additional one-year extension, list the total amount of \$38,000 (\$19,200+\$19,200).
 - **For H-1B cases:** Enter the UC full-time Salary only for the extension time period in the Appointment Tab (annual salary to nearest dollar).
5. **Attach required documents**
 - See [list of required documents](#) for comprehensive list.
 - HR is responsible for uploading ISSO Fee Form. Be sure to update scholar's local address and email.
 - Do **NOT** delete previously uploaded documents when uploading extension documents
 - **Please remember to BUNDLE documents.**
6. **Notes Tab:** Add Note indicating details about extension request that may be out of the ordinary.
7. **Submit the Information.** To submit the information to ISSO, go to the **Tasks** Action Bar above the Tabs.
 - Click **Review and Submit Visitor's Information.**
 - If J-1 extension, update the Profile Status to **SEVIS-Active**
 - If H-1B extension, update Profile Status to **Active/Enrolled**
 - Press **Submit**. This will send the information to ISSO for processing.

Tasks | Notes | Documents | Forms | History

Biographical | Address | Appointment | Site Of Activity | Funding | Other

Review and Submit Information

Submit

Please carefully review all information and select the appropriate Profile Status, Profile Type and Profile SubType for this visitor. All required fields must be completed. Click **Submit** to send this visitor's information to the international office.

Profile Status: SEVIS - Active | Profile Type: J-1 | Profile Subtype: Scholar | Profile Subtype If Other: []

After Submitting to ISSO

After submitting scholar's information, do not make any further changes to the record unless requested by ISSO.

1. **Visitor's Permissions:** Confirm that you have set visitor's permissions to "None" so that scholars are unable to make changes after submitting to you (see p 12).
2. **Making Changes After Submission to ISSO:**
 - If you need to make updates, ISSO will change the ISD **Processing Stage** in the Biographical Tab to "**Department Review Requested**" and will email you. Once you have made the requested changes, submit the request a second time, and email your adviser.
 - If an adviser has not prompted you and you need to make changes, contact your ISSO Scholar Adviser first. Do NOT resubmit the record without first notifying ISSO, as this may cause data discrepancies or duplicate records.
3. **Processing Time:** The ten working days processing time for J-1 cases starts when a *complete* request has been submitted. You can check the history tab to see when the record was submitted to ISSO.
4. **Missing Documents:** If documents are missing or information needs clarification, ISSO will contact you and give you instructions, and will change the processing stage to **Department Review Requested**.
5. **After Processing:** When ISSO has completed the processing, the **Processing Stage** in the Biographical Tab will be set to Blank, and:
 - **For J-1 cases:** Once the DS-2019 has been issued, ISSO FedExes the document to the scholar. ISSO will Cc HR in email correspondence with the scholar regarding FedEx shipment. However, this information will not be updated in the Notes section of ISD. Please keep this FedEx email in an accessible place if the scholar requests status update. For extensions, ISSO will email the scholar to pick-up their Ds-2019 form.
 - **For H-1B Cases:** H-1B cases will be submitted to the California Service Center, and ISSO will notify HR when the receipt notice is received.

History Tab

- The history tab allows HR and ISSO to review ISD actions taken on the record. These include the creation of the record, the invitation sent to the scholar, processing stage updates, and data and document submissions and edits.
- Visitors **cannot** view the history tab. Only HR and ISSO have access to this feature.

Visitor : ChrisTEST2A FloresTEST2A
 Campus ID : FSx345
 fsaScholar ID : FS18
 Academic Department : Biochemistry & Biophysics
 Visitor Status : Active
 Processing Stage : Department Review Requested

Compose Email

Tasks | Notes | Documents | Forms | **History** | Biographical | Address | Appointment | Site Of Activity | Funding | Other ▶

Save | Reset

Other Features: Email

If HR wishes to keep a record of emails sent to the scholar, using the ISD email feature (located in the upper right-hand corner of the scholar's ISD record page) will save the message in the visitor's record under the History Tab. If the scholar replies to the email, it will be sent directly to the HR representative and not noted in ISD unless HR manually adds a note.

Resetting the Visitor's Password

1. Click on the **Tasks** Tab of the ISD Action Bar
2. Click **Edit Visitor Login and Permissions**
3. Check the **Reset Password** box and click the **Save** button.

The screenshot shows the 'Edit Visitor' form with three main sections: Basic Information, Login Information, and Visitor Permissions. The 'Save' button in the top navigation bar is circled in red. In the 'Login Information' section, the 'Reset Password' checkbox is also circled in red and checked. The form contains the following fields and options:

- Basic Information:** Last Name (Nigorizawa), First Name (Hollyscholar), Middle Name, Campus ID, Status (Active), Department User (Nigorizawa, Holly), ISSO Advisor (Nigorizawa, Holly).
- Login Information:** User Name (nhol), Email (holly), and a checked 'Reset Password' checkbox with a note: '(Check this box if the visitor is locked out. Visitor will be unlocked and the password is sent to visitor at the email address listed above)'. There are red error indicators next to the User Name and Email fields.
- Visitor Permissions:** Radio buttons for 'Read/Write (Visitor can modify personal information)', 'View (Visitor can only view personal information)', and 'None (Visitor cannot log into International Scholar Dossier)'. The 'None' option is selected.

An email containing a new password will automatically be sent to the scholar. **You do NOT need to re-invite the scholar or compose an email.**

ISD feedback

We welcome your input and feedback on ISD. Email holly.nigorizawa@ucsf.edu to provide feedback on how ISD is working for you.

Sample ISD Email Invitation to Scholar ****HR should Cc themselves in the invitation email**

Subject: UCSF Visa Request Application Required By XXXX (Scholar Last Name, First Name)

Dear Mr./Mrs. First Name LAST NAME,

Congratulations on your UC San Francisco Academic Appointment with the Department of XXXX. To issue your legal documents, UC San Francisco requires that you complete and submit visa paperwork in an online database called International Scholar Dossier (ISD). UC San Francisco is unable to move forward with your Academic Appointment without a *complete* application submitted (with required documents uploaded) by XXXX DATE.

When accessing ISD, only use the following web browsers:

- Internet Explorer (version 8x and above), or
- Mozilla Firefox (version 3.5x and above)

Use of other browser software (Safari, Google Chrome, etc.) may cause errors.

Contact me, your HR representative, when you have submitted your application in ISD with ALL required documents.

****Do not schedule your flight or visa interview appointment until you have received the appropriate legal documents in hand from the UC San Francisco International Students and Scholars Office. Doing so may cause you to reschedule your appointment for a later date.****

Please use the below username and password to log into the URL specified. If you have questions throughout this process, please do not hesitate to contact me.

Sincerely,

HR Representative Name

This section will be blank in the body of the email HR generates in ISD. However, when HR clicks 'Send' in ISD, the system will send the scholar the ISD URL, the scholar's username and their temporary password. Include your email in the Cc to the scholar so that you also have access to this information.

Sample Passport



P<USA<<OBAMA<<BARACK<HUSSEIN<<
311958554USA1234567M1234567890123456<123456

Passport Barcode: If there is a symbol in the name, enter the name in ISD as it appears in this section

Information Request Guide for J-1 Scholars

This guide is intended to assist HR with gathering required information from J-scholars to enter into ISD.
Use only if HR will complete data entry fields on behalf of J-scholar.

BIOGRAPHICAL

Please provide the following information as it appears within passport:

- a) Passport Surname/last name(s):
- b) Passport first name(s), followed by middle name(s):
- c) Gender: Male / Female
- d) Date of birth (Month, Day, Year):
- e) City of birth:
- f) Country of birth:
 - a. Country of citizenship. (If dual citizenship, list country which issued passport that scholar will use to enter U.S.):
 - b. Country of Legal Permanent Residence. (*Country where legal permanent resident status has been granted by the federal government of that country*):

ADDRESSES

- 1) If you are currently living in the U.S., what is your U.S. address?
- 2) What is your personal email address that you will check regularly while at UCSF?:
- 3) Permanent address abroad:
- 4) Phone number:
- 5) Mailing address to which the DS-2019 should be sent? If the same as permanent address, leave blank.

FUNDING

- 1) Who will be funding your visit and for what amount? Please list all sources and amounts for your program duration. For example, China Scholarship Counsel, \$21,000/ year.

POSITION IN HOME COUNTRY

- 1) Last position or occupation in **home country** (i.e. Professor, Researcher, Student)? If you were a student, indicate “graduate student” or “undergraduate student”:
- 2) What is the employer name or institution for above position?
- 3) What type of employer is it? Educational, private, city or government institution, other? Only select from these options.

PASSPORT AND VISA

CURRENT US INSTITUTION:

- 1) Requesting a change of status to J-1 or H-1B from within the U.S.? Include current legal documents as attachments.
- 2) Transferring current program to UCSF from another U.S. University? Include current legal documents as attachments. Include UCSF [J-1 Transfer In form](#) as attachment, if applicable.
- 3) If currently in U.S., immigration status listed on I-94? Include copy of I-94 as attachment.

PRIOR VISA HISTORY

- 1) Currently subject to the 2-year (212e) residency requirement?
- 2) Been a J-1 exchange visitor or J-2 dependent within past 24 months? Include previous DS-2019s as attachment.
- 3) Received a waiver recommendation of 2-year home country residency requirement?

Information Request Guide for J-1 Scholars (cont'd)

EDUCATION INFORMATION

- 1) Have a medical degree (for example, MD, DDS or equivalent)?
- 2) Highest degree earned?
- 3) Year highest degree earned?

CURRENT U.S. INSTITUTION

- 1) Currently in U.S. holding position at another institution?
 - a) If yes, please provide name of current U.S. institution:

DEPENDENT(S) – SPECIFIC ****Do not provide information for U.S. citizen dependents****

If your spouse and/or child(ren) will accompany you in J-2 status, please provide the following details for each dependent:

- 1) Passport Surname/last name(s):
- 2) Passport first name(s), followed by middle name(s):
- 3) Gender (male or female):
- 4) Date of birth (Month, Day, Year):
- 5) City of birth (as listed in passport):
- 6) Country of citizenship:
- 7) Country of Legal Permanent Residence:
- 8) Relationship to scholar (legally married spouse or unmarried child under 21 years of age):
- 9) Has dependent held J-1 or J-2 status within the past 24 months? If so, attach DS-2019 forms.

DEPENDENT(S) – GENERAL

- 1) Family currently in the U.S.? If yes, what is their visa status?
- 2) Will dependent stay in U.S. to apply for a change of status (to J-2, H-4, etc.)?
- 3) Will legally married spouse accompany you?
- 4) Will unmarried children under 21 years of age accompany you?

SCHOLAR TO ATTACH A COPY OF THE FOLLOWING DOCUMENTS

- Identity/biographical page of passport showing full name, date of birth, and expiration date
- Identity/biographical page of any J-2 dependents' passport(s) showing full name, date of birth, and expiration date
- Documentation of funding (if not paid by UCSF). Funding must have [currency conversion](#) if not in U.S. dollars and translation if not in English. Funding letter or statement must be issued within past 6 months.
- Previous/Current Forms DS-2019 (if you or your family have been in J status in past two years).
- If you and your family are currently in the U.S., copies of Forms I-94, visa stamps, Forms I-20 (if applicable), Employment Authorization Documents (if applicable).

Information Request Guide for H-1B Scholars

This guide is intended to assist HR with gathering required information from H-1B scholars to enter into ISD.
Use only if HR will complete data entry fields on behalf of H-1B scholar.

BIOGRAPHICAL

Please provide the following information as it appears within passport:

- 1) Passport Surname/Last Name:
- 2) Passport First Name, followed by middle name(s):
- 3) Gender:
- 4) Date of Birth (day, month, year):
- 5) City of Birth:
- 6) Country of Birth:
- 7) Country of Citizenship:
- 8) Country of Legal Permanent Residence:

ADDRESSES

- 1) Local Address (U.S.):
- 2) Email Address:
- 3) Permanent Address (abroad):
- 4) Phone number:

PASSPORT AND VISA

- 1) Requesting change of status to J-1 or H-1B from within the U.S.?
- 2) Transferring to UCSF from another U.S. University?
- 3) If currently in U.S., immigration status listed on I-94:
- 4) Currently subject to the 2-year (212e) residency requirement?
- 5) Been a J-1 or J-2 within past 24 months? Received a waiver recommendation of 2-year home residency requirement?
- 6) Received a waiver of two year (212e) home residency requirement?
- 7) Previously been to U.S. on H-1B or L status?
- 8) Most Recent U.S. Arrival Date:
- 9) If currently in U.S. and scholar plans to travel abroad in next 6 months, list travel dates:
- 10) If currently in U.S., I-94 number:
- 11) If currently in U.S., I-94 expiration date (DD, MM, YYYY):
- 12) Petition for permanent residence pending?
- 13) Passport Number:
- 14) Passport Expiration Date:
- 15) Indicate city and country where scholar will apply for visa stamp, if applicable (Canadians exempt):
- 16) Is the H1B scholar in exclusion or deportation proceedings?

EDUCATION

- 1) Does scholar have MD or DDS?
- 2) Highest degree earned:
- 3) Year highest degree earned AND Name of Institution Where Degree Received:

CURRENT U.S. INSTITUTION

- 1) Currently in U.S. holding a position at another institution?
- 2) If yes, name of current U.S. institution:

Information Request Guide for H-1B Scholars (cont'd)

DEPENDENT(S) – SPECIFIC ****Do not provide information for U.S. citizen dependents****

If your spouse and/or child(ren) will accompany you in H-4 status, please provide the following details for each dependent:

- 1) Dependent's Last Name:
- 2) Dependent's First Name, followed by middle names (if any) Gender (male or female):
- 3) Gender:
- 4) Date of Birth (DD, MM, YYYY):
- 5) City of Birth (as listed in passport):
- 6) Country of Birth:
- 7) Country of Citizenship:
- 8) Country of Legal Permanent Residence:
- 9) Relationship to Scholar (must be legally married spouse or unmarried child under 21 years):
- 10) Dependent held J-1 or J-2 status within past 12 months?

DEPENDENT(S) – GENERAL

- 1) Is scholar's family currently in U.S.?
- 2) If yes, what is their visa status?
- 3) If yes, will dependents stay in U.S. to apply for a change of status (to J-2, H-4, etc.)?
- 4) Will a legally married spouse accompany the scholar?
- 5) Will unmarried children under 21 years of age accompany the scholar?

****PLEASE SEE [H-1B PETITION CHECKLIST FOR SCHOLAR](#) FOR A LIST OF DOCUMENTS TO ATTACH****