Department Administrator Guidebook
H-1B (TN, E-3) Requests

https://ISD.ucsd.edu

Revised: 6/29/2020
# Table of Contents

- Department Administrator Guidebook
  - H-1B (TN, E-3) Requests
  - Department Administrator Instructions
  - How to Login to ISD
    - VPN Subpool
    - Sign into ISD
  - Fees
    - Online Recharge
    - USCIS Checks
  - Prepare to Complete Initial Application
  - Quick Tips
  - Finding an Existing Scholar Record
  - Contacting the Scholar
    - Invite Visitor – Tasks Tab
    - Confirm Visitor Information – Tasks Tab
    - Compose Email – Tasks Tab
    - Current Email Program
  - Navigation Bar Views
    - Department View
    - Scholar View
  - Notes Tab
  - Forms Tab
  - History Tab
  - Scholar Login Troubleshooting
    - Forgot Username and Password
    - Forgot Password
    - Cannot Log In
  - Initial Application
    - Step 1: Create a Scholar Record
      - Basic Information Section
      - Login Information Section
        - Username Already Exists
      - Visitor Permissions
    - Step 2: Invite the Scholar
Tasks Tab......................................................................................................................... 19
Need to correct something or re-invite the scholar?.................................................. 20
Step 3: Review the Scholar Record After Scholar Submission.................................. 22
Search for a Scholar Record ......................................................................................... 22
Locking Scholar Access ................................................................................................. 22
Adding Notes ................................................................................................................ 23
Contact Scholar to Verify Information ........................................................................ 23
Reviewing Submitted Information................................................................................ 23
Biographical Tab .......................................................................................................... 24
Address Tab .................................................................................................................. 24
Appointment Tab .......................................................................................................... 24
Site of Activity Tab ....................................................................................................... 27
Funding Tab .................................................................................................................. 27
Other Tab ...................................................................................................................... 27
Step 4: Attach Supporting Documentation ................................................................. 28
Initial H-1B/E-3/TN Submission Form........................................................................ 30
Degree/Diploma ........................................................................................................... 30
Foreign Credentials Evaluation .................................................................................... 30
Appointment Document/Job Description/Advertisements ......................................... 30
Letter from Employer .................................................................................................. 30
Clinical Care Documentation (H-1B/E-3 only; TN not allowed)................................. 31
Graduates of International Medical Schools ............................................................... 31
Graduates of Accredited U.S. Medical Schools ........................................................... 31
Required if the UCSD appointment/job advertisement has as a requirement .......... 31
Required for ALL Clinical Training programs through ECFMG................................. 31
Step 5: Recharge Fee and USCIS Checks ................................................................. 31
Online Recharge ......................................................................................................... 31
USCIS Checks .............................................................................................................. 31
Step 6: Review and Submit to IFSO............................................................................ 31
Rush Fee ...................................................................................................................... 32
Extension/Amendment ............................................................................................... 34
Step 1: Search for scholar record ................................................................................. 34
Step 2: Invite the Scholar to Update Personal Information ......................................... 34
Step 3: Update the scholar record with extension/amendment information ............. 35
Search for a Scholar Record ......................................................................................... 35
Locking Scholar Access ............................................................................................... 36
Adding Notes .............................................................................................................. 36
Contact Scholar to Verify Information ................................................................. 37
Biographical Tab ................................................................................................. 37
Appointment Tab ................................................................................................. 37
Site of Activity Tab .............................................................................................. 37
Funding Tab ........................................................................................................... 38
Other Tab ............................................................................................................... 38

Step 4: Attach Supporting Documentation .......................................................... 38
Extension/Amendment H-1B/E-3 Submission Form ............................................ 39
Degree/Diploma ..................................................................................................... 39
Foreign Credentials Evaluation ............................................................................ 39
Appointment Document/Job Description/Advertisements ..................................... 39
Letter from Employer ........................................................................................... 40
Clinical Care Documentation (H-1B/E-3 only; TN not allowed) ............................ 40
  Graduates of International Medical Schools ....................................................... 40
  Graduates of Accredited U.S. Medical Schools .................................................. 40
  Required if the UCSD appointment/job advertisement has as a requirement .... 40
  Required for ALL Clinical Training programs through ECFMG ....................... 40

Step 5: Recharge Fee and USCIS Checks ............................................................. 40
Online Recharge ................................................................................................... 40
USCIS Checks ....................................................................................................... 41

Step 6: Review and Submit to IFSO ................................................................... 41
Rush Fee ................................................................................................................ 41
Locking Scholar Access ......................................................................................... 41
Adding Notes .......................................................................................................... 42

Submission with IFSO .......................................................................................... 44
Questions ............................................................................................................... 44

**Department Administrator Instructions**

Welcome to International Scholar Dossier (ISD), a web-based application used by the International Faculty & Scholars Office (IFSO) to manage the invitation process for J-1 Exchange Visitors and H-1B/TN/E-3 employees at UC San Diego. ISD allows you, the departmental administrator, to create a scholar record in the system for your prospective scholar, who will then be notified to enter their data and upload supporting documentation to the system. When they are finished, the system will notify you to review the data and documentation from the scholar, as well as add additional data and supporting documentation from the department side. Once completed, the record can be submitted to IFSO who will then review the submission. IFSO will issue the DS-2019 or file the employment-based petition or reach out to you for any additional information/documentation that is required.
How to Login to ISD
VPN Subpool

To access ISD you must go through UC San Diego's VPN, regardless of whether you are on or off campus. If you have not already done so, install UCSD's VPN onto your computer.

To access ISD you must use a **specific VPN subpool**, this is done by adding "@isd" to your active directory credentials.

- **Group**: 2-Step Secured - Split
- **Username**: [your active directory username]@isd
- **Passcode**: [your active directory passcode]

• Make sure to accept the pop up indicating you are signing into the ISD Subpool VPN.

**Tip**: Scholars do not need to use a VPN to access their ISD website link.

After successfully signing into the VPN you can proceed to the ISD website.
Sign into ISD

IFSO will create a login for all new departmental administrators needing access to ISD, generating an automatic email to you (subject line: “International Scholar Dossier: New user account creation”) with login/password information and URL for ISD (https://ISD.ucsd.edu); we recommend that you login and change your password. To do so, click on My Account in the top right-hand corner of the screen and type in your old and new passwords in the appropriate fields.

If you forget your username/password or have difficulties logging in, send an email to ifsoisd@ucsd.edu and IFSO staff will help you.

TIP: Your ISD Link is https://ISD.ucsd.edu, while the scholar ISD login link is https://ISD-visitor.ucsd.edu

Fees

ALL fees for H-1B/E-3 requests MUST be paid by the sponsoring department. Fees are not rechargeable to the international scholar and scholars cannot reimburse the department for these fees.

Note: institutional policy requires that departments pay the service fee for all persons appointed in Postdoctoral appointments.

If you have questions about the payment process, contact ifsorecharge@ucsd.edu

Online Recharge

Please also remember to submit an online recharge payment for your request, which must be done separately from the ISD process. You do not need to include proof of recharge payment through ISD; it will be checked by IFSO. The employment-based petition will not be filed until payment has been made.

- $2500 IFSO Service Fee H-1B/E-3 (TN is $900)
- $700 RUSH fee. Any complete H-1B submission requesting a start date in less than three-months’ time or requesting filing in under two months’ time from submission to IFSO must include a RUSH fee.

Recharge instructions: https://ifso.ucsd.edu/dept-facilitators/online-recharge.html

USCIS Checks

In addition to the recharge fees there are USCIS required checks that will need to be provided to IFSO for the filing the employment-based petition. Request checks from UC San Diego IPPS/MyPayments. These checks must be individually issued.

- $460 I-129 Petition Processing fee
- $500 Anti-fraud fee (H-1B/E-3 only initial requests)
- $1440 Premium Processing fee

USCIS Check ordering instructions: https://ifso.ucsd.edu/_visa/checks.html
**Prepare to Complete Initial Application**
To complete this process for Employment Based requests (H-1B, E-3, TN), you will need the following:

- Completed Employment Based Submission Form
- Letter from Employer (Chair Letter)
- If Staff Title, include copy of Job description
- If Faculty Title (to be sponsored for permanent residence), copy of the printed job advertisement and official offer letter

**Quick Tips**
- The **system times out** after inactivity. Please make sure to save often to avoid losing any information.

  ![Save button]

- If you have questions about what to input in a data field, place your cursor over the **question-mark icon** for clarifying information (you do not need to click). Use these for instructions regarding what information is necessary for that specific field.

  ![Example]

- **Red dots** indicate that the field is required.

  ![Example]

- **Additional tips** will be included throughout the guidebook in green font.

- **Save when going from one section to the next**, especially through the horizontal navigation bar sections. The system does not auto save or prompt you to save before leaving a section.

- Do not change the “**Processing Stage**” as the system will automatically update the stage. The scholar does not have the option to edit the processing stage, but they can view the stage.

Department view of processing stage:
Scholar and department can view the processing stage visible as heading of each page:

- **Changes/Information saved** will not be submitted to IFSO unless you submit the changes via the Review and Submit Visitor’s information option.

**Finding an Existing Scholar Record**
If a scholar already exists in the ISD system, please do not create a duplicate record. To see if a record already exists, you can select “Search for Visitor” on the left-side “Home” bar.
You can search for the scholar record on the following Search Visitor Screen.

**TIP**: To find the record, you may need to change the filters to “All”

Scholar records will appear on the bottom; you can click on the "Last Name" hyperlink to access and edit the specific scholar record.

### Search Results

**# of visitor record(s) found: 1**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Academic Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>TESTING1</td>
<td>NG</td>
<td>AH: Theatre &amp; Dance</td>
</tr>
</tbody>
</table>

If you are unable find the record, contact IFSO at ifsoisd@ucsd.edu.
**Contacting the Scholar**
We always recommend emailing the scholar at a UCSD email or personal email (gmail, yahoo, etc.). We encourage you to not email Scholars at other institution email addresses (as we do not know how long scholar will retain access) or @hanmail.net (UCSD emails have been getting blocked).

**Invite Visitor – Tasks Tab**
- This generates a user name and new password every time an email is sent generated to the scholar. We recommend only doing this once. This can also be a quick way to send the scholar a new password, if you do not want to reset the password by going to Edit Visitor Login and Permissions under the Tasks Tab.
- The sender email address will be the email address of the admin noted under the Task Tab section “Edit Visitor Login and Permissions.” If the scholar replies the email goes to the department contact’s UCSD email that is associated with the ISD account.
- The email sent to the scholar is logged in the Case History of ISD. Please note that the scholar response is not saved to the Case History of ISD as it goes to your UCSD email account.
- You can cc yourself to ensure you also have a history of the emails in your UCSD email account.

**Confirm Visitor Information – Tasks Tab**
- Will only allow you to generate an email to the scholar for whose record you are currently working on. You can CC or BCC additional individuals. We recommend this option is used when you want the scholar to review/confirm any final information prior to submission to IFSO.
- The sender appears as the department UCSD email; if the scholar replies the email goes to the department contact’s UCSD email.
- The email sent to the scholar is logged in the Case History of ISD. Please note that the scholar response is not saved to the Case History of ISD.
- You can cc yourself to ensure you also have a history of the emails in your UCSD email account.

**Compose Email – Tasks Tab**
- Will allow you to generate an email, CC and BCC anyone you would like. We recommend this option is used when you want an email to be logged in the Case History of ISD
- The sender appears as the department UCSD email; if the scholar replies the email goes to the department contact’s UCSD email.
- The email sent to the scholar is logged in the Case History of ISD. Please note that the scholar response is not saved to the Case History of ISD.
- You can cc yourself to ensure you also have a history of the emails in your UCSD email account.
Current Email Program

- Apart from the initial Invite Visitor email, which generates the password and login for the scholar, you do not have to use ISD to generate emails. The benefit of using ISD to send emails, however, is that the information is logged into one location for continuity purposes.

Navigation Bar Views

Department View

Scholar View

Notes Tab

The Notes Tab is only accessible to the department and IFSO. The notes section can be used to write a note to IFSO or just an internal reminder for yourself. However, since IFSO has access to view this information please make sure whether it’s an internal note for yourself/your department or for IFSO.
Forms Tab
The forms tab allows you to preview what information the scholar could enter on ISD as opposed to the department; some information is listed for both the scholar and department to enter to ensure both review the information.

History Tab
The History tab shows the history associated with the scholar record; you will get to see any emails sent through the ISD system, updates made, etc. This is great historical information for newly hired departmental administrators.

Please note that scholar responses to emails generated from ISD are not saved into the ISD History Tab because the response is sent to the department email associated with the ISD account.
Scholar Login Troubleshooting
Forgot Username and Password
If the scholar does not recall their username or password, there are two main paths you can take to have ISD generate an email with their username and generate a new password.

1) Edit the Scholar’s permissions by going to the Tasks tab and clicking on Edit Visitor Login and Permissions.

Once on the Edit Visitor section you will be able to select the reset password option. By clicking on the box an email will be generated to the scholar with their username and a new password.

TIP: This is the preferred method of having the department help a scholar that does not recall their username or password.

2) Re-invite the scholar, by going to the Tasks tab then clicking on Invite Scholar.

You will have the option to write any text on the email. When the email is generated it will include the username and new password below any text you include, the same way it was generated the first time you invited the scholar to access ISD.
**TIP**: This method is not the preferred method but can be beneficial to have the ability to write a note to the scholar with any additional information the department may want to convey.

**Forgot Password**
If the scholar forgot their password, you can regenerate the password by going to the Tasks tab and clicking on Edit Visitor Login and Permissions.

Once on the Edit Visitor section you will be able to select the reset password option. By clicking on the box an email will be generated to the scholar with their username and a new password.
**Cannot Log In**
If the scholar cannot log in, they might have incorrect username, password or not have permission to log in.

To begin troubleshooting:
1) Make sure the scholar has permission to access ISD, they should have Read/Write or View access to be able to log into ISD. If their access is set to None, even with the correct username and password they won't be able to log in.

2) Make sure they have the correct scholar link [https://ISD-visitor.ucsd.edu](https://ISD-visitor.ucsd.edu).
3) Resend them their password by following the steps listed under the forgot password section above.

**Initial Application**
There are six basic steps to complete in this web-based application:

1. Create **Scholar Record**, if not already in ISD
2. **Invite the Scholar** (ISD access)
3. **Review the Scholar Record and Input Department Information** after Scholar Submission
4. **Upload Supporting Documentation**
5. **Recharge Fee and USCIS Checks**
6. Review and **Submit to IFSO**

The following provides detailed information on completing each of the above steps.

**Step 1: Create a Scholar Record**

If this is the first time this scholar is being processed through the ISD system, you will need to create a new scholar record.

To add a new scholar record, on the left-side "Home" bar, click on "Add Visitor" to create a new Scholar profile in ISD.
Basic Information Section
The information provided in the Basic Information section should be information about the incoming scholar, not you the department administrator.

Tip: Did you know that ISPO and IFSO share a database (ISSM)? Entering the scholar last name in all caps helps avoid any confusion between ISPO student records and IFSO scholar records. Also, it helps distinguish very clearly the last name as some individuals may have multiple last names.

NOTE: IF YOU RECEIVE THE MESSAGE BELOW, PLEASE REACH OUT TO IFSOISD@UCSD.EDU WITH NAME OF SCHOLAR AND EMAIL ADDRESS, AND IFSO WILL CREATE THE BASIC INFORMATION RECORD FOR YOU. This will typically happen for scholars currently on F-1 OPT or who return to UCSD periodically.

Duplicate record(s) found in ISSM
The following record already exists in ISSM database that matches the visitor that you are trying to add. Please select the matching Campus Id of the ISSM record below, click on Continue for the visitor you would like to add.
The following fields are required:

- **Last Name**: Include the Scholar’s Last Name as it appears on their passport biographical page
  
  **TIP**: Please enter the scholar’s LAST NAME in all capital letters.
- **First Name**: Include the Scholar’s First name as it appears on their passport biographical page. Unless the scholar does not have one.
- **Campus**: select "University of California, San Diego"
- **Academic Department**: Select the appropriate department from the drop-down list. The departments as listed by division, then in alphabetical order by department.

  **Division Breakdown**
  
  **AFFL**: Affiliate institutions
  
  **AH**: Arts and Humanities departments
  
  **BS**: Biological Sciences departments
  
  **JSOE**: Jacobs School of Engineering departments
  
  **MC**: Main campus ORUs
  
  **Other (UCSD)**: Do not use this option unless IFSO instructs you to do so. To use this option, you would need to be granted department user permission.
  
  **Rady School of Management (UCSD)**
  
  **School of Global Policy & Strategy (UCSD)**
  
  **SIO**: Scripps Institution of Oceanography departments/ORUs
  
  **Skaggs School of Pharmacy and Pharmaceutical Science (UCSD)**
  
  **SOM**: School of Medicine departments/ORUs
  
  **SS**: Social Sciences departments
  
  **University Extension (UCSD)**
  
  **VC**: Vice Chancellor areas

  **TIP**: Can’t find the department in the drop-down list? Contact IFSO at ifsoisd@ucsd.edu for help.

- **Department User**: From the drop-down menu of available departmental contacts for the sponsoring department, select the person that will have responsibility over the invitation process for this incoming scholar.

  **TIP**: Can’t find the department administrator in the drop-down list? Contact IFSO at ifsoisd@ucsd.edu for help.

- **ISSO Advisor**: Does not need to be updated, it should default to Admin, Admin

  **TIP**: Ignore the Campus ID field.

**Login Information Section**

The Login Information section will allow you to create a user name for the scholar to access ISD, grant them editing permissions, and fill in their record in ISD.

- **User Name**: Use the given/first and family/last names of the scholar. You will not be able to change the scholar’s user name after it is created.

  **TIP**: Do not leave any spaces for the username. This will be their permanent username, try to make it simple. We highly encourage:
  
  o LASTNAME-FirstName
- Email: Add the email address for the scholar. Please note that UC San Diego emails have been getting blocked/bouncebacks for "@hanmail.net" emails. Please try to avoid using "@hanmail.net" emails.

**TIP**: You can always go back in to update the email address associated with the ISD account. This is the email will receive all the correspondence generated by the ISD system are sent to.

**Username Already Exists**
The error “This UserName already exists, please Correct” means that the username is already in use but by another scholar, so you will need to add something to the username you want to create for your scholar to make it unique.

**TIP**: Do not leave any spaces for the username. This will be their permanent username so try to make it simple. We highly encourage:
- Firstname-LASTNAME
- LASTNAMEFirstNameDept
- LASTNAMEFirstNameDOB
- LASTNAME-FirstName-Birthyear
Visitor Permissions
Select "Read/Write" so that the scholar can input their information.

Permission levels:
- Read/Write: Allows the scholar to sign in and enter information.
- View: Allows the scholar to sign in but they cannot edit any information.
None: Scholar will not be able to log into ISD system. They wouldn’t know whether their access has been taken away or they are entering incorrect login information.

**TIP:** Scholar will not be aware of their permission levels; it is up to you to disclose which permission levels they have been granted or have been taken away.

Click "Save" this will immediately take you to the scholar biographical information page.

---

**Do not complete any information at this time.**

---

**Step 2: Invite the Scholar**

**Tasks Tab**

After record creation, click on the "Tasks" tab in the top left-hand corner of the horizontal navigation bar toward the top of the screen. Once there, click "Invite Visitor."

**TIP:** If you need to fix something that you entered in the Add Visitor screen, you can select Edit Visitor Login and Permissions before inviting the scholar.

Compose an email greeting to the scholar and hit "Send." ISD will automatically send the URL to ISD, user name, and auto-generated password to the scholar. When the scholar
receives the email, the login information will be automatically generated by the system and be located below your message.

**TIP:** IFSO has a few sample templates available on https://ifso.ucsd.edu/_visa/isd.html

After this step, the invited scholar will have to add information and upload certain documents. The scholar has access to a Scholar Guidebook with instructions regarding how to complete the process.

**Need to correct something or re-invite the scholar?**
If there is some issue where you need to correct something and/or re-invite the scholar, you will need to find the scholar’s record in ISD.

To find the record again, you can select “Search for Visitor” on the left-side navigation bar.
You can search for the record on the following Search Visitor Screen. To find the record, you may need to change the filters to “All”

Scholar records will appear on the bottom, you can click on the "Last Name" hyperlink to access and edit the specific scholar record.

From here, you can select “Tasks” again and edit the scholar’s login information or send a new invitation email to the scholar.

**TIP**: Every time you send an invitation to the scholar, ISD will generate a new password which will replace the previous sent password or any password the scholar has since created.
Step 3: Review the Scholar Record After Scholar Submission

When the prospective scholar completes and submits their information and uploaded documentation, an email will be sent to the department administrator indicating that the record is ready for review. The departmental administrator reviews the data and documentation uploaded by the scholar for completeness.

The administrator will also input additional information and upload documentation from the department.

Tip: Please note that you will not be able to make changes in the record when the scholar is logged into the system.

Search for a Scholar Record
To find a scholar, follow the instructions noted in the Finding an Existing Scholar Record section of this guidebook. If you are unable find the record, contact IFSO at ifsoisd@ucsd.edu.

Locking Scholar Access
To prevent the scholar from making changes to their record while it is being processed by IFSO, we recommend you change the scholar’s permissions to “View” only at some point in your process.

If you request the scholar to update their record directly, however, you will need to change their permissions back to “Read/Write.”

We leave it up to you to decide where in your process you choose to lock the scholar’s access to their record. To change permissions, select the “Tasks” button and click on “Edit Visitor Login and Permissions:”

Then select the appropriate permissions level and click on the “Save” button:
Adding Notes
During this process, if you have special notes for this record that you would like to make, select the Notes Tab on the Horizontal Fields Navigation Bar and click on Add Note. These notes will be visible to Department Administrators with ISD access under your department and to IFSO advisors but not to the scholar.

Contact Scholar to Verify Information
If you need to contact the scholar to verify certain information, you can select “Compose Email” in the top right side of the screen. This will generate an email to the scholar.

TIP: This will send the email you compose. However, it will not treat the email as an initial invitation and thus will not overwrite the scholar’s current password.

Reviewing Submitted Information
To begin reviewing and completing this part of the process, click on the Horizontal Fields Navigation Bar to review the data in each Tab:
- Biographical
- Address
- Appointment
• Site of Activity
• Funding
• Other
  o Position in Home Country
  o Passport and Visa
  o Education
  o Dependent-Specific
  o Dependent-General

Biographical Tab
Please verify that the scholar completed this information.

For records in the VC Health Sciences area administered by ARC, add the ARC number.

Address Tab
The scholar will have added their permanent address in their home country. If they are currently inside the U.S., they should have also added residential address information in the local address tab. Scholars not currently in the U.S. should still include an email in the local address tab. IFSO uses the “local” address for reporting purposes.

Tip: please note that we advise the scholar to never use the mailing address option.

Appointment Tab
For ALL Visitors
• Employer Name: UC San Diego
• Start Date: Enter the preferred start date of the appointment
• End Date: Enter the preferred end date of the appointment
• Job Title: Select a job title from the drop-down menu; if a staff title in career tracks, indicate the level in “If Other (job title)—e.g., P3 or M1
• **Faculty Sponsor**: Identify the faculty sponsor
• **Does apt require teaching?** Indicate yes or no if position requires formal teaching (not mentoring UGs in labs, but rather classroom teaching or grand rounds)
• **Is position Full-Time**: Indicate yes or no
• **Number of Hours Per Week**: If appointment is not full time, indicate number of hours per week; otherwise leave blank
• **Is the Position Tenure Track**: Indicate yes or no
• **RUSH Request**: Indicate “Yes” or “No.” RUSH requests entail paying the RUSH fee of $700 (for online payment see: [https://ifso.ucsd.edu/dept-facilitators/vs-recharge-form.html](https://ifso.ucsd.edu/dept-facilitators/vs-recharge-form.html)). Note that any H-1B request with a start date of under three months in the future, or a request to file the petition with USCIS within two months of submission to IFSO, will require a RUSH fee.

**For H Visitors Only section** (SHOULD BE COMPLETED BY E-3’s as well)
• **Location of employment**: Enter the number of worksites. For example if the scholar is working at McGill Hall and Shiley Eye Institute, you would list “2” or “two” in this field.

Click save or after completing the Appointment Tab go to the Notes Tab to enter the specific building name and address for the worksite(s).

Enter for note subject line “worksites” and list the building names and addresses of all worksites in the body of the note:
FAILURE TO INCLUDE ALL WORKSITES MAY REQUIRE AN AMENDED PETITION WITH ALL ASSOCIATED COSTS.

- **Minimal Degree and Discipline**: Enter the minimal degree required for the POSITION (not the scholar’s highest degree); also indicate acceptable discipline(s) for the degree
- **Post-Degree Experience Required**: Enter the number of MONTHS experience required for the position; e.g., for an IT staff title requiring 3 years, enter 36. For a clinical faculty requiring 3 yrs residency training and 2 years fellowship, enter 60.
- **Is the position permanent?** Indicate yes or no if the department is planning on sponsoring this employee for permanent residency
- **Full-Time Salary**: Enter the annualized salary, digits only (no comma!; other characters will result in an error message). For represented positions, make sure that the salary reflects at least the amount from the appropriate salary scale/level as of the requested start date of the H-1B appointment.
Click “Save.”

**Site of Activity Tab**
Skip this tab; this information is only needed for J-1 requests

**Funding Tab**
Skip this tab; this information is only needed for J-1 requests

**Other Tab**
These are sections that should have been completed by the incoming scholar. Please review them to verify that necessary fields have been completed.
Step 4: Attach Supporting Documentation

Click on the Documents Tab on the top of the Horizontal Fields Navigation Bar towards the top of the screen in order to upload the required documents from the list below.

It is recommended to scan the entire group of documents required into one file and upload it; click “Choose File” and select the appropriate document from your computer; then key in the name of the document in “Document Name” and select “Complete Supporting Documentation File” as the document type. If additional documents are uploaded at a later time, repeat the process, selecting the appropriate “Document Type” from the drop-down menu. Click save.

**TIP:** Do not use any symbols when naming a document; an error will result.
**TIP:** Ignore the "Is Active?" option

You will know the items have been successfully uploaded because they will be visible on the List of Documents. If an item you uploaded is not listed on the List of Documents, please upload again.
LIST OF REQUIRED DOCUMENTS
Note: any document not in English will require a complete translation accompanied by a statement from the translator that they are competent to translate from that language into English and that the translation is a thorough translation of the entire document):

Initial H-1B/E-3/TN Submission Form
The sponsoring department uses Employment Based request form-fillable pdf to authorize IFSO to file the employment-based petition on behalf of the prospective worker and to meet other regulatory requirements of the U.S. Depts of Homeland Security and Labor. In submitting this form to IFSO, the department attests to all statements on the form.

Degree/Diploma
To qualify for H-1B/E-3 status, a position must be in a specialty occupation, requiring at least the level of a Bachelor’s degree. The H-1B beneficiary must meet the minimal educational requirements of the position. Upload diplomas for all relevant degrees. Any document not in English will require a translation and translator’s certification (see above). If the diploma does not specify a particular field, then transcripts must be submitted that indicate in which field the diploma was obtained. If a diploma is not available, transcripts can be used instead, as long as the transcript indicates the degree issued. E-3 is only available to Australian citizens; TN to Mexican/Canadian citizens. The TN must be for a NAFTA approved occupational classification.

Foreign Credentials Evaluation
If the relevant degrees are not from a U.S. institution, then a foreign credentials evaluation certifying the U.S. degree equivalency must be submitted (exception: Clinical Care appointments do not need evaluations of foreign MD degrees). The evaluation should include field of study, a detailed description of the material evaluated, rather than conclusions, and a brief description of the qualifications and experience of the evaluator. For more information, see: https://ifso.ucsd.edu/dept-facilitators/h1b/index.html#Education-and-Credential-Evalua

Appointment Document/Job Description/Advertisements
• An official appointment letter is necessary for all appointments
• If the appointment is for a staff position, include the Job Description
• If faculty appointment for which a nationwide search was done, include job advertisements from national journals

Letter from Employer
On letterhead and signed by department chair. Include detailed information such as techniques and methodologies used by researchers, specific classes taught by faculty, and specific clinical duties for clinical positions. Failure to provide specific information may result in increased chance for USCIS requesting additional evidence, which will delay petition approval. For examples of letters, see templates on website at: https://ifso.ucsd.edu/dept-facilitators/h1b/index.html
Clinical Care Documentation (H-1B/E-3 only; TN not allowed)

Graduates of International Medical Schools
- ECFMG Certification (unless a graduate of a Canadian medical school)
- U.S. Medical Licensing Examination (USMLE) Steps 1-3
  --or--
  National Board of Medical Examiners (NMBE) examinations – Parts 1-3
  --or--
  FLEX examination
- CA Medical License documentation

Graduates of Accredited U.S. Medical Schools
- Internationals with a medical degree from an accredited U.S. institution need only provide IFSO with their U.S. MD diploma and, starting 1/1/2020, the Postgraduate Training License (PTL).

Required if the UCSD appointment/job advertisement has as a requirement
- Medical Residency completion certificate
- Clinical Fellowship completion certificate
- Board Certification
- Documentation establishing Board Eligibility (UC San Diego issued documentation is not acceptable)

Required for ALL Clinical Training programs through ECFMG
- GME exception to policy allowing for H-1B sponsorship

Step 5: Recharge Fee and USCIS Checks
ALL H-1B/E-3 fees MUST be paid by the employing department; fees are NOT rechargeable to the scholar.

Online Recharge
Online recharge payments can be made on IFSO’s website.
- $2500 IFSO Service Fee H-1B/E-3 (TN is $900)
- $700 RUSH fee. Any complete H-1B submission requesting a start date in less than three-months’ time or requesting filing in under two months’ time from submission to IFSO must include a RUSH fee.

USCIS Checks
Request checks from UC San Diego IPPS/MyPayments. These checks must be individually issued.
- $460 I-129 Petition Processing fee
- $500 Anti-fraud fee (H-1B/E-3 only)
- $1440 Premium Processing fee

Step 6: Review and Submit to IFSO
Click on the "Tasks" tab on the left-hand side of the top Horizontal Fields Navigation Bar and click on "Review and Submit Visitor's Information."
The screen will show a list of all fields lacking information that need to be completed and submission will not be allowed until the fields are complete.

**TIP**: If you need the scholar to confirm specific information, click on the "Tasks" tab and select "Confirm Visitor Information;" an email dialog box will be displayed and your message can be sent directly to the scholar to complete specific data fields.

**Rush Fee**
Before you proceed to submit the case to IFSO, review the rush request field in the Appointment Information horizontal navigation bar option. By the time you are ready to submit the case, the rush processing fee may now be required.
After all required fields are completed, select:

- Profile Status: "Pending"
- Profile Type: "H-1B Temporary Specialty Worker"
- Profile Subtype: "Scholar"
- Profile Subtype If Other: leave blank

Click "Submit" button toward the left-hand top of the screen. This action forwards the complete record to IFSO staff to review.

**Tip:** to update any missing information you must go to the Horizontal Fields Navigation Bar then return to Review and Submit to Department section.

**Example:** The notice below is letting you know that you did not complete the highest degree earned information in the Education tab.
Once all fields have been entered, click on "Submit" button in upper left-hand corner of screen.

After it is submitted, it should show that the record was “sent to ISSM.”

![Review and Submit Information](image)

**Extension/Amendment**

**Step 1: Search for scholar record**

To find a scholar, follow the instructions noted in the Finding an Existing Scholar Record section of this guidebook. If you are unable find the record, or receive the message below, contact IFSO at ifsoisd@ucsd.edu before proceeding.

![Duplicate record(s) found in ISSM](image)

**Step 2: Invite the Scholar to Update Personal Information**

- Click on the Tasks tab and select Edit Visitor Login and Permissions.

![Tasks](image)

- Select Read/Write so that the scholar can input their information.
• Go back to the Tasks tab and click Invite Visitor. An email dialogue box will open. Insert a message to the Scholar you can create your own or use a template listed on https://ifso.ucsd.edu/_visa/isd.html#Sample-E-Email-Templates. Once you have the message click the Send button.

Invite Visitor

• When the scholar completes updating their record they will be prompted to submit it to the department for review, and you will receive a system-generated email when it is available in ISD prompting you to review the record.

Step 3: Update the scholar record with extension/amendment information

Search for a Scholar Record
To find a scholar, follow the instructions noted in the Finding an Existing Scholar Record section of this guidebook. If you are unable find the record, contact IFSO at ifsoisd@ucsd.edu.

**Locking Scholar Access**

To prevent the scholar from making changes to their record while it is being processed by IFSO, we recommend you change the scholar’s permissions to “View” only at some point in your process.

If you request the scholar to update their record directly, however, you will need to change their permissions back to “Read/Write.”

We leave it up to you to decide where in your process you choose to lock the scholar’s access to their record. To change permissions, select the “Tasks” button and click on “Edit Visitor Login and Permissions:”

Then select the appropriate permissions level and click on the “Save” button:

**Adding Notes**

During this process, if you have special notes for this record that you would like to make, select the Notes Tab on the Horizontal Fields Navigation Bar and click on Add Note. These
notes will be visible to Department Administrators with ISD access under your department and to IFSO advisors but **not to the scholar**.

**Contact Scholar to Verify Information**
If you need to contact the scholar to verify certain information, you can select “Compose Email” in the top right side of the screen. This will generate an email to the scholar.

**TIP**: This will send the email you compose. However, it will **not** treat the email as an initial invitation and thus will not overwrite the scholar’s current password.

Search for the record in ISD and click on it to open; update information in the following fields under the Horizontal Fields Navigation Bar (by clicking on each field heading):

- **Biographical Tab**
  - If the case is handled by ARC, input the new ARC case number in “ARC Number” field

- **Appointment Tab**
  - **Update the preferred Start and End Date to the new requested period**
  - Input/Update the Job Title as needed
  - Input/Update Faculty Sponsor as needed
  - Input/Update Full-time status and number of hours/week as needed
  - Update any data under the H Visitors Only section. If there are additional worksites, add them as a note in the “Notes” tab (include building and address for each site).

- **Site of Activity Tab**
  - Ignore this section (only for J-1 visitors)
Funding Tab
- Ignore this section (only for J-1 visitors)

Other Tab
- Ignore these sections

Step 4: Attach Supporting Documentation

Changes in appointment title or funding will require supporting documentation.

Click “Choose File,” and select the appropriate required document from your computer. Then key in the name of the document in “Document Name” and select Document Type from the drop-down menu. Click save. Repeat file uploads for all required documentation.

TIP: if all documents are scanned in a single file, select "Complete Supporting Documentation File" as the Document Type.

TIP: Do not use any symbols when naming a document; an error will result.

TIP: Ignore the “Is Active?” option
You will know the items have been successfully uploaded because they will be visible on the List of Documents. If an item you uploaded is not listed on the List of Documents, please upload again.

### Extension/Amendment H-1B/E-3 Submission Form

The sponsoring department uses the Employment Based request form-fillable pdf to authorize IFSO to file the H-1B petition on behalf of the prospective worker and to meet other regulatory requirements of the U.S. Depts of Homeland Security and Labor. In submitting this form to IFSO, the department attests to all statements on the form.

### Degree/Diploma

Upload diplomas for all relevant degrees if they do not already exist in the ISD record. Any document not in English will require a translation and translator’s certification. If the diploma does not specify a particular field, then transcripts must be submitted that indicate in which field the diploma was obtained. If a diploma is not available, transcripts can be used instead, as long as the transcript indicates the degree issued.

### Foreign Credentials Evaluation

If the relevant degrees are not from a U.S. institution, upload a foreign credentials evaluation certifying the U.S. degree equivalency if one does not already exist in the ISD record (exception: Clinical Care appointments do not need evaluations of foreign MD degrees). The evaluation should include field of study, a detailed description of the material evaluated, rather than conclusions, and a brief description of the qualifications and experience of the evaluator. For more information, see: [https://ifso.ucsd.edu/dept-facilitators/h1b/index.html#Education-and-Credential-Evaluations](https://ifso.ucsd.edu/dept-facilitators/h1b/index.html#Education-and-Credential-Evaluations)

### Appointment Document/Job Description/Advertisements

- An official appointment letter is necessary for all appointments
- If the appointment is for a staff position, include the Job Description
• If faculty appointment for which a nationwide search was newly executed, include job advertisements from national journals

**Letter from Employer**
On letterhead and signed by department chair. Include detailed information such as techniques and methodologies used by researchers, specific classes taught by faculty, and specific clinical duties for clinical positions. Failure to provide specific information may result in an increased chance of USCIS requesting additional evidence, which will delay petition approval. For examples of letters, see templates on website at: https://ifso.ucsd.edu/dept-facilitators/h1b/index.html

**Clinical Care Documentation (H-1B/E-3 only; TN not allowed)**
Include the following documents if they do not already exist in the ISD record:

**Graduates of International Medical Schools**
- ECFMG Certification (unless a graduate of a Canadian medical school)
- U.S. Medical Licensing Examination (USMLE) Steps 1-3
  --or--
  National Board of Medical Examiners (NMBE) examinations – Parts 1-3
  --or--
  FLEX examination
- CA Medical License documentation

**Graduates of Accredited U.S. Medical Schools**
- Internationals with a medical degree from an accredited U.S. institution need only provide IFSO with their U.S. MD diploma and, starting 1/1/2020, the Postgraduate Training License (PTL).

**Required if the UCSD appointment/job advertisement has as a requirement**
- Medical Residency completion certificate
- Clinical Fellowship completion certificate
- Board Certification
- Documentation establishing Board Eligibility (UC San Diego issued documentation is not acceptable)

**Required for ALL Clinical Training programs through ECFMG**
- GME exception to policy allowing for H-1B sponsorship

**Step 5: Recharge Fee and USCIS Checks**
ALL H-1B/E-3 fees MUST be paid by the employing department; fees are NOT rechargeable to the scholar.

**Online Recharge**
Online recharge payments can be made on IFSO’s website.

- $2500 IFSO Service Fee H-1B/E-3 (TN is $900)
- $700 RUSH fee. Any complete H-1B submission requesting a start date in less than three-months’ time or requesting filing in under two months’ time from submission to IFSO must include a RUSH fee.
USCIS Checks
Request checks from UC San Diego IPPS/MyPayments. These checks must be individually issued.

- $460  I-129 Petition Processing fee
- $1440  Premium Processing fee

Step 6: Review and Submit to IFSO

Rush Fee
Before you proceed to submit the case to IFSO, review the rush request field in the Appointment Information horizontal navigation bar option. By the time you are ready to submit the case, the rush processing fee may now be required.

Locking Scholar Access
To prevent the scholar from making changes to their record while it is being processed by IFSO, we recommend you change the scholar’s permissions to “View” only at some point in your process.

If you request the scholar to update their record directly, however, you will need to change their permissions back to “Read/Write.”

We leave it up to you to decide where in your process you choose to lock the scholar’s access to their record. To change permissions, select the “Tasks” button and click on “Edit Visitor Login and Permissions:”
Then select the appropriate permissions level and click on the “Save” button:

**Visitor Permissions**

- Read/Write (Visitor can modify personal information)
- View (Visitor can only view personal information)
- None (Visitor cannot log into International Scholar Dossier)

Click on the “Save” button.

**Adding Notes**

During this process, if you have special notes for this record that you would like to make, select the Notes Tab on the Horizontal Fields Navigation Bar and click on Add Note. These notes will be visible to Department Administrators with ISD access under your department and to IFSO advisors but not to the scholar.

Click on the "Tasks" tab on the left-hand side of the top Horizontal Fields Navigation Bar and click on "Review and Submit Visitor's Information."
The screen will show a list of all fields lacking information that need to be completed and submission will not be allowed until the fields are complete.

**TIP**: If you need the scholar to confirm specific information, click on the "Tasks" tab and select "Confirm Visitor Information;" an email dialog box will be displayed and your message can be sent directly to the scholar to complete specific data fields.

After all required fields are completed, select:
- Profile Status: "pending"
- Profile Type: "H-1B Temporary Specialty Worker"
- Profile Subtype: "Scholar"
- Profile Subtype If Other: leave blank

Click "Submit" button toward the left-hand top of the screen. This action forwards the complete record to IFSO staff to review.

After it is submitted, it should show that the record was “sent to ISSM.”
Make sure to update the scholar’s employee records and appointment dates with the office holding purview over the appointment.

**Submission with IFSO**

IFSO staff will review all the information and documents submitted with this record. If anything is missing from the department or the scholar, we will be in contact with the scholar and/or the departmental administrator.

Please refer to our website: [https://ifso.ucsd.edu/dept-facilitators/h1b/index.html](https://ifso.ucsd.edu/dept-facilitators/h1b/index.html) for processing time information.

**Questions**

ISD related questions: ifsoisd@ucsd.edu

Case related questions: Advisor assigned to Scholar by Scholar Last/Family Name.

<table>
<thead>
<tr>
<th>Scholar Family Name</th>
<th>Advisor Name</th>
<th>Advisor Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - H</td>
<td>Dalia Alshamas</td>
<td>x61447</td>
</tr>
<tr>
<td>I - P</td>
<td>Marie Manlapaz</td>
<td>x24015</td>
</tr>
<tr>
<td>Q - Z</td>
<td>Lucas Olson</td>
<td>x25541</td>
</tr>
</tbody>
</table>