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

https://ISD.ucsd.edu

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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.

   ![Cisco AnyConnect]

   **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](https://ISD.ucsd.edu).

**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](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.

![Welcome, Admin Admin My Account](image)

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

**TIP**: Your ISD Link is [https://ISD.ucsd.edu](https://ISD.ucsd.edu), while the scholar ISD login link is [https://ISD-visitor.ucsd.edu](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.

Breakdown of H-1B fees can be found on [IFSO’s website](https://ISD.ucsd.edu). If you have questions about the payment process, contact [ifsorecharge@ucsd.edu](mailto: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.

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

**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

Request checks from UC San Diego: see instructions [https://ifso.ucsd.edu/_visa/checks.html](https://ifso.ucsd.edu/_visa/checks.html). These checks must be individually issued.

For check amounts, please see IFSO website: [https://ifso.ucsd.edu/dept-facilitators/h1b/index.html#Fees-and USCIS-Check(s)](https://ifso.ucsd.edu/dept-facilitators/h1b/index.html#Fees-and- USCIS-Check(s))

**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.

- 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:**

<table>
<thead>
<tr>
<th>Passport Last Name</th>
<th><img src="red-dot-icon.png" alt="Required Field" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Passport First Name</td>
<td><img src="red-dot-icon.png" alt="Required Field" /></td>
</tr>
<tr>
<td>Passport Suffix</td>
<td><img src="red-dot-icon.png" alt="Required Field" /></td>
</tr>
</tbody>
</table>

- **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.

<table>
<thead>
<tr>
<th>Biographical</th>
<th>Address</th>
<th>Appointment</th>
<th>Site Of Activity</th>
<th>Funding</th>
<th>Other</th>
</tr>
</thead>
</table>

- 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.

**Processing Stage In ISD**
The processing stage listed in ISD can be used to give you a general idea of the status of your requests.

- Do not change the “Processing Stage” 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 of processing stage visible as heading of each page:

**Stages**

- Initial = Record created in ISD, but scholar needs to be invited to gain access to ISD
- Invited = You invited the scholar to sign into ISD and they have received their login information for ISD
- Pending Scholar Data Entry = Scholar needs to update/add information to ISD
- Pending Department Review = You need to complete your portion in ISD and submit the request to IFSO.
- Submitted to International Office = IFSO or USCIS is still processing the request
- Clear/Blank Processing Stage = IFSO has completed your request (i.e. issued DS-2019 or processed an amendment) or USCIS approved a request (H-1B initial/extension/amendment).

**Example:** Clear/Blank Processing Stage
Example: Clear/Blank processing stage in the search for a visitor screen

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**

![Department View](image)

**Scholar View**

![Scholar View](image)

**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.

![Notes Tab](image)

**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 wont 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.

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**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.

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 Scien(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:
  - LASTNAME-FirstName
  - LASTNAMEFirstNameDept
  - LASTNAMEFirstNameDOB
  - LASTNAME-FirstName-Birthyear

- **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 that 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

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**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.**

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**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](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](https://ifso.ucsd.edu/_visa/isd.html) 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**
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
  - Position in Home Country
  - Passport and Visa
  - Education
  - Dependent-Specific
  - Dependent-General

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**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.

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**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 appt 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
- **Is this a unionized position**: Indicate whether this position is in a union (Collective Bargaining Unit).
- **RUSH Request**: Indicate “Yes” or “No.” RUSH requests entail paying the RUSH fee (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. After completing the Appointment Tab go to the Site of Activity tab to enter the specific building name and address for the worksite(s).
Site of Activity Tab

- Click on "Add New" button to add the site(s) of activity.

- Select the primary site of activity from the drop-down menu under "Prefill SOA"; if it is not listed, enter the site's individual address components in the fields.
  - Input the name of the building in Site Address Line 2
  
  **TIP**: For SIO, please use the UCSD main campus address.

- Add any additional sites of activity as needed. Add a new site of activity for each building the scholar will be working in, even if the address is the same. So, if there are 3 different buildings, there should be 3 entries on this tab.

- Click Save.

  **TIP**: Review the Site of Activity list to make sure all site of activities you added are included.
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.”

**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:

**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.

**Passport Biographical Page**
The Passport Biographical page must be from Scholar’s current unexpired passport.

**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.
Curriculum Vitae
Scholar should not include immigration, personal, or volunteer information on this document.

Immigration Documents if Scholar is currently inside the U.S.
- I-94 arrival/departure record for most recent entry into U.S.
- Visa stamp used for most recent entry to the U.S.
- Entry stamp in passport documenting most recent entry to the U.S.
- If currently in a paid position, three most recent earnings statements
- If currently in F status: all I-20s issued since last entry to the U.S.
- If ever in J status: all DS-2019 forms issued scholar and, if applicable, a copy of their I-612 Waiver approval notice if subject to 212(e)
- If ever in H-1B status, copies of all I-797 approval notices
- If ever issued an Employment Authorization Document (EAD), copies of all EADs

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

For more information, see: https://ifso.ucsd.edu/dept-facilitators/h1b/index.html#Education-and-Credential-Evaluation
• 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.

**Breakdown of fees**
The breakdown of recharge and check fees required for H-1B requests can be found on [IFSO’s website](https://www.ifso.ucsd.edu).

**Online Recharge**
Online recharge payments can be made on [IFSO’s website](https://www.ifso.ucsd.edu).

**USCIS Checks**
Request checks from UC San Diego: see instructions [https://ifso.ucsd.edu/_visa/checks.html](https://ifso.ucsd.edu/_visa/checks.html). These checks must be individually issued.

**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.

![Documents](image)

| Biographical | Address | Appointment | Position In Home Country | Passport And Visa | Other |

**Example:** The notice below is letting you know that you did not complete the highest degree earned information in the Education tab.

![Review and Submit Information to Your Department](image)

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

- Highest degree earned in (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)

**Record was sent to ISSM.**

**IFSO Receives Request and USCIS Approves H-1B Request**

The department and scholar will receive an email from IFSO confirming that the H-1B request has been mailed out to USCIS for their processing. The processing stage in ISD will remain as “Submitted to International Office” until USCIS approves the H-1B request.

Once IFSO receives the H-1B approval notice, we will email the department and scholar and change the processing stage in ISD from “Submitted to International Office” to a Clear/Blank processing stage.

**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.

**Step 2: Review Scholar Email and Update Department User**

Once you find the scholar, go to the Tasks Tab and under the Edit Visitor Login and Permissions review the scholar’s email (edit if necessary) and update the department user from IFSO ISD to yourself.

Don’t forget to hit save.

Reviewing/updating the scholar email in the Edit Visitor Login and Permissions is especially important for extensions/amendments as the email listed there is usually from an initial request, which typically won’t be the scholar’s UCSD email.

**Step 3: Invite the Scholar to Update Personal Information**
- Click on the Tasks tab and select Edit Visitor Login and Permissions.
  - Tasks
  - Invites Visitor
  - Edit Visitor Login and Permissions
  - Review and Submit Visitor’s information
  - Change Visitor’s Department
  - Confirm Visitor Information

- 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-Mail-Templates. Once you have the message click the Send button.
• 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 4: 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. Enter how many worksites there will be in the “Location of Employment Field”

- Site of Activity Tab
  - Select the primary site of activity from the drop-down menu under "Prefill SOA"; if it is not listed, enter the site's individual address components in the fields.
    - Input the name of the building in Site Address Line 2
  - Add additional worksites as needed.

- Funding Tab
  - Ignore this section (only for J-1 visitors)

- Other Tab
  - Ignore these sections

Step 5: Attach 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.
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.

Passport Biographical Page
The Passport Biographical page must be from Scholar’s current unexpired passport.

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-Evaluation

Curriculum Vitae
Scholar should not include immigration, personal, or volunteer information on this document.

Immigration Documents if Scholar is currently inside the U.S.
- I-94 arrival/departure record for most recent entry into U.S.
- Visa stamp used for most recent entry to the U.S.
- Entry stamp in passport documenting most recent entry to the U.S.
- If currently in a paid position, three most recent earnings statements
If currently in F status: all I-20s issued since last entry to the U.S.
If ever in J status: all DS-2019 forms issued scholar and, if applicable, a copy of their I-612 Waiver approval notice if subject to 212(e)
If ever in H-1B status, copies of all I-797 approval notices
If ever issued an Employment Authorization Document (EAD), copies of all EADs

**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](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 6: 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.
Breakdown of fees
The breakdown of recharge and check fees required for H-1B requests can be found on IFSO’s website.

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

USCIS Checks
Request checks from UC San Diego: see instructions https://ifso.ucsd.edu/_visa/checks.html. These checks must be individually issued.

Step 7: 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:

**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."

![Tasks Tab](image)

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.

![Confirm Visitor Information](image)

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

![Profile Options](image)

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.

**IFSO Receives Request and USCIS Approves H-1B Request**

The department and scholar will receive an email from IFSO confirming that the H-1B request has been mailed out to USCIS for their processing. The processing stage in ISD will remain as “Submitted to International Office” until USCIS approves the H-1B request.

Once IFSO receives the H-1B approval notice, we will email the department and scholar and change the processing stage in ISD from “Submitted to International Office” to a Clear/Blank processing stage.

**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.

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<th>Scholar Family Name</th>
<th>Advisor Name</th>
<th>Advisor Extension</th>
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<tr>
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