Department Administrator Guidebook

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 at UC San Diego. ISD allows you, the departmental administrator, to create a scholar record in the system for your prospective J-1 visitor, 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 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 (https://ISD.ucsd.edu) for ISD; 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 ischolars@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

**Recharge Fees**
Please also remember to submit an online recharge payment for this J 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 form DS-2019 will not be issued until payment has been made.

You can find instructions on IFSO’s website: https://ifso.ucsd.edu/dept-facilitators/online-recharge.html

**Prepare to Complete Initial Application**
To complete this process, you will need the following:
- Completed J-1 Submission Form
- Approved appointment document
- 5-point statement, if MD with incidental patient contact

**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 on the question-mark icon, just place your cursor over the icon. Use these for instructions regarding what information is necessary for that specific field.

**Example:**

<table>
<thead>
<tr>
<th>Passport Last Name</th>
<th>Passport First Name</th>
<th>Passport Suffix</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Passport Last Name</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Passport First Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passport Suffix</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- **Save when going from one section to the next**, specially 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**” 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:**

- **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 ischolars@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 appears as ISD system (issmhelp@ucsd.edu), if the scholar replies the email goes to the department contact’s UCSD email which 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 as that generates the password and login for the scholar, you do not have to use ISD to generate emails you can continue to use your UCSD outlook/gmail. The benefit of using ISD to send emails is that the information is logged into one location for continuity purposes.

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**Navigation Bar Views**

**Department View**

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**Scholar View**

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**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 the 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 are 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 departments with turn over.

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, to the scholar 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.
Can’t 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.

![Visitor Permissions](image)

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 five basic steps to complete in this web-based application:

1. Create Scholar Record
2. Invite the Scholar (ISD access)
3. Review the Scholar Record and Input Department Information after Scholar Submission
4. Upload Supporting Documentation
5. 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 and IFSO records. Also, it helps distinguish very clearly the last name as some individuals may have multiple.

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 departments
- **AH**: Arts and Humanities departments
- **BS**: Biological Sciences departments
- **JSOE**: Jacobs School of Engineering departments
- **MC**: Main campus departments
- **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
- **Skaggs School of Pharmacy and Pharmaceutical Scien (UCSD)**
- **SOM**: School of Medicine departments
- **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 ischolars@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 ischolars@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 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 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, try to make it simple. We highly encourage:
- LASTNAME-FirstName
- 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](https://ifso.ucsd.edu_visa/isd)

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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) 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.

**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 ischolars@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.

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

Here the department administrator should add a department contact email.
  • Under Address Information, click Add New.
• Select the Address Type as “Alternate” and add your department email address at the bottom, then hit save.
  o You can leave the question “Is this a Current Address?” as No.

This will help us communicate directly with the department should the scholar's visa process be delayed. No other information in the "Alternate Address" section is needed.

**TIP:** By a department contact entering their email as the address in the "Alternate Address" section, IFSO’s internal database ISSM will retain the information. The
email address will be used to send automatically generated reminders, such as expiry, orientation, check in, etc.

**Appointment Tab**
- **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
- **Faculty Sponsor**: Identify the faculty sponsor
- **Is position Full Time**: Indicate yes or no for staff positions; leave blank for academic positions
- **Number of Hours Per Week**: If staff position is not full time, indicate number of hours per week
- **Is the Position Tenure Track**: Indicate yes or no
- **J Visitors Only Section**:
  - Indicate if the appointment is for under six months with or without the possibility of extension
  - Select the J visitor category from the drop-down menu

Please note that only four of the options are allowed at UC San Diego, described below. Read the descriptions below as there are different regulations for each J-1 category.

- **Research Scholar** – For scholars here for up to 5 years. Will be subject to the 24-month bar prohibiting repeat participation in a new J-1 Research Scholar/Professor program
- **Professor** – If the scholar will be primarily teaching. Can be used up to 5 years and will be subject to the 24-month bar prohibiting repeat participation in a new J-1 Research Scholar/Professor program
- **Short-Term Scholar** – For scholars here for 6 months or less; will not be subject to the 24 month bar
- **Student Intern** – For visiting undergraduate students that will be returning to their home country’s undergraduate program after UCSD

- In Subject Field code remarks, add information about what the scholar will be researching and/or teaching. Please be descriptive, such as “teaching courses and research in mathematics,” or “Clinical observation in radiology.” For scholars with a medical degree, input either “NO ELEMENT OF PATIENT CONTACT” or “INCIDENTAL PATIENT CONTACT” as appropriate after program description.
• **RUSH Request:** Indicate “Yes” or “No.” RUSH requests entail paying the RUSH fee of $300 (for online payments, see: [https://ifso.ucsd.edu/dept-facilitators/ys-recharge-form.html](https://ifso.ucsd.edu/dept-facilitators/ys-recharge-form.html)). Note that J-1 requests require a start date of 45 days from request submission to IFSO; any shorter time would require the RUSH fee or else IFSO will adjust the start date to 45 days from submission. This policy reflects the processing time of our federal agencies, which include lengthy background checks required by the U.S. Dept of State for visa applications.

• Click "Save."

**Site of Activity Tab**

• Click on "Add New" button to add the site(s) of activity.  
  **TIP:** Skip this step for "Student Intern" category records; you will enter it later

• 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.  
  **TIP:** For SIO, please use the UCSD main campus address, example:
- Add any additional sites of activity as needed.
  - There should only be one “Primary Site,” at which the scholar will spend most of the time.

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

Federal regulations require that all sites of activity for the Exchange Visitor be reported. A "Site of Activity" is one at which the scholar will be regularly working; for example, where federal agents on an unannounced site visit would expect to find the scholar. If a scholar is only irregularly working at a particular location, do not include it as a site of activity.

**Funding Tab**
Add funding sources that will be used by the scholar during their program.
If UCSD salary or stipend, include the full period's amount under "Program Sponsor Funds."

**TIP**: The funding must be listed for the entire period of J time. If scholar’s funding is reported in monthly income, make sure you multiply that income by the number of months the scholar will be on the program.

For all other funding sources, include in the appropriate category: "International Organization," "Government," "Other Organization," and/or "Personal."

Overall funding amount must meet minimum monthly requirement of:
- $2400/month for scholar plus additional...
- $800/month for spouse
- $400/month for each child

**TIP**: Funding should be entered without any spaces, dashes or dollar signs. Do not include cents. Please note that you will be able to save the information with spaces, dashes, dollar signs, or cents but when you try to submit the case with IFSO you will receive an error.

**Example**:

For "Benefits," indicate "Yes" if scholar will meet BELI 1, 2, or 3 (and eligible for UCSD-sponsored health insurance); enter "No" if not.
**Other Tab**
These are sections that should have been completed by the incoming J-1 scholar. Please go through them to verify that they have been completed.

**Education Section**
If the scholar indicated they have a Medical Degree, section 3 of the J-1 submission form will need to be completed and uploaded to ISD; this form is fillable at: [https://ifso.ucsd.edu/_files/ifso/j1_form.pdf](https://ifso.ucsd.edu/_files/ifso/j1_form.pdf)

**J-1 Student Intern T/IPP**
If the scholar will be coming in the J-1 Student Intern category, make sure to complete the section titled T/IPP Information. This can be found under “Other.”

TIP: Please note that the T/IPP Information section will not appear if the J Visitor category is not listed as Student Intern in the Appointment Tab.
1. Complete the fields under DS-7002 Participant Information. Then click “Save.”

2. After saving, select “Add New T/IPP Site.” You won’t be able to do this until you click save.

3. Site of Activity Section: enter where the J-1 Student Intern will be working. You can use the Prefill SOA option or enter manually.
4. Organization Information section: follow the prompts to fill in these fields.

5. Supervisor Information: Add information about the supervisor.

6. Leave the EV Signature Date field blank and hit save.

7. The form will go back to the previous screen. From here, select “Add Phase” in the bottom right.
8. Add a Phase Name, the dates of the phase, and the field of the phase. The entire duration of the program (shown above) should be covered by a phase. If there is just one phase, it should be for the same dates as the program.

9. Enter the phase supervisor's information and leave the signature date blank.

10. Complete the following fields regarding the J-1 Student Intern. Please give thorough responses in order to avoid problems when applying for the J-1 visa:

11. Click save
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.

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 listed above.

**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.

**Initial J-1 Submission Form**
The sponsoring department uses this form-fillable pdf to authorize IFSO to issue the DS-2019 for the prospective Exchange Visitor. Complete the scholar’s name, and gather certifying signatures in section 4; electronic signatures are fine. Complete sections 2 and/or 3 as necessary.

**English Language Proficiency**
Federal regulations require documentation showing that the J-1 scholar is proficient in English. This documentation could include test scores, certification by an academic organization, or interview.

A. Test score results--IELTS band 6 or higher; TOEFL 61 (IBT), 173 (computer-based), or 500 (paper based); PETS level 5 or higher

B. Institutional or English language school certification--on letterhead in English and issued within past six months, verifying the Exchange Visitor possesses English proficiency high enough to function daily at UCSD and in the local community, with a school official's signature.

C. Statement from Department (interview: mechanism, date, duration, interviewer name, and signature)

Verify that the scholar uploaded item A or B; if these are not available, make sure to complete Section 2 of the “Initial J-1 Submission Form” documenting the interview, to include date, duration, interviewer, method of interview, and signed statement.

**Appointment letter**
An appointment letter is necessary for all appointments.

**5-Point Statement**
If the scholar has an MD or equivalent and incidental patient contact will be a component of the program activity, then we will need the five-point statement outlined in Section 3 of the “Initial J-1 Submission Form” printed on letterhead and uploaded with the Medical School Dean’s or Dean’s Designee’s signature.

**Funding**
If non-UCSD funding, verify that scholar has uploaded funding documentation that meets the minimum monthly requirements.
- Scholar only: $2400/month
- Accompanying J-2 spouse: $800/month
- Accompanying J-2 children: $400/month per child

**Step 5: 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."

![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.

**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: "SEVIS - Pending"
- Profile Type: "J-1 Exchange Visitor"
- 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.”

**Amendment After Scholar Arrival to U.S. (Not a Date 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, contact IFSO at ischolars@ucsd.edu.

**Step 2: Update Data Fields**

Update data by clicking on each section of the Horizontal Fields Navigation Bar:
Biographical Tab
Typically, this data will not change

Address Tab
Scholar will typically report these data changes separately by completing IFSO’s Change of Address form.

Appointment Tab
- If the department is changing, contact IFSO at ischolars@ucsd.edu for instructions.
- If the end date is changing, follow the process for “EXTENSION”; a recharge payment will be required!
- Update the Job Title if needed; if a staff title under career tracks, include the subclassification in “If Other (job title)” field (e.g., “P3,” “S2,” “M1”)
- Update Faculty Sponsor, if needed
- Do not change any data under the J Visitors Only section; if there is a significant change in the research area (Subject field code remarks), send email to ischolars@ucsd.edu to inquire about next steps

Site of Activity Tab
- Update the site of activity if needed by clicking on “Edit” button next to the site that needs to be updated
• Add an additional site of activity if needed by clicking on “Add New” button; make sure to indicate whether it is a “Primary Site” or not
• Sites of activity cannot be deleted; they can only be updated

**Funding Tab**
• Add all source of funds into the appropriate fields—do not overwrite existing funds but rather add them to the existing funds.
  
  **Example**: current amount in record is $36,000; additional amount is $20,000. The field should be updated to $56,000 (not $20,000).

• Update benefits eligibility if needed

  **TIP**: BELI 1-3 is yes; 4-5 is no

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**Other Tab**

Typically, this data will not change.

**Step 3: Attach Supporting Documentation**

Changes in appointment title or funding will require supporting documentation (unless VGS or postdoc appointments are already approved in VGS/RSAS).

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.
**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.
Step 4: 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.

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: "SEVIS - Active"
- Profile Type: "J-1 Exchange Visitor"
- 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.”

**Amendment - Date Change (prior to scholar arrival at UCSD)**

**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, contact IFSO at ischolars@ucsd.edu.

**Step 2: Update Data Fields “Start Date” and “End Date”**

Update the data by clicking on the Appointment field heading located on the Horizontal Fields Navigation Bar and then change the dates in the start and end date fields according to the new approved appointment dates (or anticipated dates); click Save.

**Step 3: Indicate reason for date change request**

Click on the Notes tab and then click on the Add Note button.
A box will open for you to input a Subject line “date amendment” and brief reason for the date amendment request (e.g., visa delay; illness in family, etc.); click “Save:”

Step 4: 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.

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: "SEVIS - Pending"
- Profile Type: "J-1 Exchange Visitor"
- 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.

**Extension for Scholar Already in ISD**

**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, contact IFSO at ischolars@ucsd.edu.

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

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

- 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. Paste the following message in (or create your own) and then click the Send button.

Dear:
Your sponsoring department is working to extend your current J-1 program. Please access the ISD site indicated below at your earliest convenience and update your information following the instructions at:

[LOGIN INFORMATION AND PASSWORD AUTO GENERATED BY SYSTEM]

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 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 ischolars@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 End Date to the end of the newly granted appointment period
- Update the Job Title, if needed
- Update Faculty Sponsor, if needed
- Do not change any data under the J Visitors Only section
• if there is a significant change in the research area (Subject field code remarks), send email to ischolars@ucsd.edu to discuss

Site of Activity Tab
• Update the site of activity if needed; add an additional site of activity if needed

Funding Tab
• Add all source of funds into the appropriate fields—do not overwrite existing funds but rather add them to the existing funds.

Funds reported should cover the entire period of the extension. 

Example: if $36,000 already exists in Program Sponsor Funds and an additional year’s funding of 36,000 is being provided by UCSD, change the total amount in the field to $72,000.

• Update benefits eligibility, if needed

TIP: BELI 1-3 is yes; 4-5 is no

Step 4: Attach Supporting Documentation

Changes in appointment title or funding will require supporting documentation (unless VGS or postdoc appointments are already approved in VGS/RSAS).

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.
**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.
Step 5: 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."

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: "SEVIS - Active"
- Profile Type: "J-1 Exchange Visitor"
- 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: [http://ifso.ucsd.edu/dept-facilitators/j1/index.html](http://ifso.ucsd.edu/dept-facilitators/j1/index.html) for processing time information.

**Questions**
ISD related questions: ischolars@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>
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<tr>
<td>A - H</td>
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