



HARVARD
International Office

ISD Administrator Manual

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ISD ADMINISTRATOR MANUAL

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ISD ADMINISTRATOR MANUAL

Introduction

What is International Scholar Dossier (ISD)?

ISD is a database system shared between Harvard International Office (HIO), Harvard departments and prospective international scholars. It is used to gather required information about international scholars' program, in order to create visa documents.

Important: ISD is used only for new, incoming scholars who have neither been a student, nor held an academic appointment at Harvard University in the past. Please create an ISD record for an incoming scholar if that scholar meets the previous criteria AND:

- Will require a new J-1 DS-2019 document from the Harvard International Office (HIO) to:
 - Begin a J-1 program with us, or
 - Transfer to us from a J-1 program at another institution.
- Will receive visa sponsorship from a third party, including:
 - F-1 Optional Practical Training (OPT) or J-1 Academic Training (AT) from another institution and will receive a Harvard academic appointment; OR,
 - J-1 sponsorship from third-party organizations, such as Fulbright, LASPAU, or AMIDEAST and will conduct his or her exchange program as a Harvard academic appointee;
- Will require TN visa sponsorship from Harvard to begin his or her academic appointment;
- Has H-1B status from another employer and will require Harvard H-1B sponsorship to begin an academic appointment here.

The Request Process

After being invited by the Harvard Department, ISD allows the international scholar to electronically submit preliminary information to the Department Administrator. After the administrator reviews the data entered by the scholar, completes the departmental data, and uploads the required attachments, s/he sends it electronically to the HIO. The HIO then processes the application and follows the delivery instructions requested.

Electronic Records and Documents

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

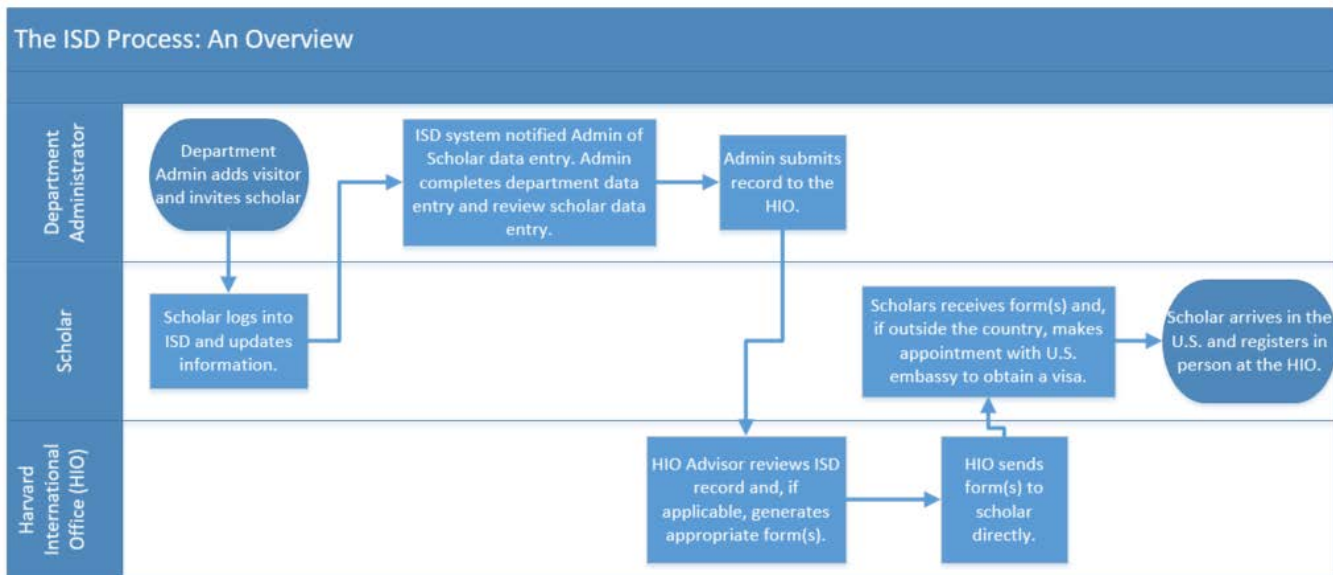
We hope that this system will benefit you as a Harvard administrator. Please contact us if you have any questions or suggestions.

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The ISD Process: An Overview

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

This flowchart is meant to be a general overview, as the process functions for J-1 Scholars. There may be slight variations in some of the steps for different visa categories, such as F-1 OPT, TN, and H-1B.



1. **Department logs in to <https://hioisdadmin.hio.harvard.edu/Login.aspx>**— Contact your HIO advisor for login credentials. After logging in for the first time, click on **My Account** (top right of welcome page) and change your password and security question to something easy to remember.
2. **Department adds and invites the scholar:**
 - a. Click **Add Visitor** from the Record Manager on the top left of ISD. Enter required information including the scholar's Name, scholar's Email, and a unique Username (we recommend using the first part of the scholar's email address, before the "@" symbol).
 - i. For example, if the email address is ExampleStudent@harvard.edu, the username could be: **ExampleStudent**
 - b. If you receive a message indicating that there may be a duplicate record, do **NOT** add the scholar; rather, email internationaloffice@harvard.edu with the scholar's passport name, date of birth, and current email address, and the name of the host department.
 - c. Click **Tasks** from the ISD Action Bar and then click **Invite Visitor**. The ISD Action Bar is the blue and bar at the top of each scholar's record where you can select tasks and access the tabs for data entry. This will allow you to compose an email which will be sent to the scholar along with their login information. Copy yourself on this email so that you can help the scholar if s/he has trouble logging

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in. Click **Send**. If the department prefers to enter all of the scholar's information, do not click **Invite Visitor**. Rather, set the visitor permission to "None" when adding the visitor and skip to step 4.

3. **Scholar inputs information:**

- a. Uses the login information provided from email sent by Department (#2, above).
- b. Uploads all required attachments.
- c. Saves updated information and documentation.
- d. ISD auto-generates message to Department Administrator informing of scholar's submission.

4. **Department completes data entry:** After the scholar has entered his/her required data and submitted it, the processing stage will be "Pending Department Review."

- a. Complete the departmental information on each tab, including the appointment, site of activity, and funding. If the scholar has failed to complete a section or you have questions about the scholar's information, contact the scholar and instruct him/her to complete/clarify the missing info. If record is incomplete, DO NOT SUBMIT TO THE HIO.
- b. Review the scholar's information for completeness and accuracy.

5. **Department uploads required documents:**

- a. Attach all required documents to the record (see "Checklist of Required Scholar Documents" for requirements).

6. **Add a note:** From the ISD Action Bar, click **Notes** to inform the HIO of the type of request being submitted, for example "New J-1."

- a. If the department has discussed a J-1 Research Scholar vs. a J-1 Short-term Scholar, add a note to indicate that you have had the conversation and to indicate the preferred category.
- b. If there is any other information you would like to communicate to HIO, please enter it in the **Notes**.

7. **Submit to Harvard International Office:**

- a. From the ISD Action Bar click **Tasks**.
- b. Click **Review and Submit Visitor's Information**. Click **Submit**. The processing stage will become "Submitted to International Office."

8. **Harvard International Office processes request:** The normal processing time is 10 business days from the receipt of a complete ISD record for J-1 case.

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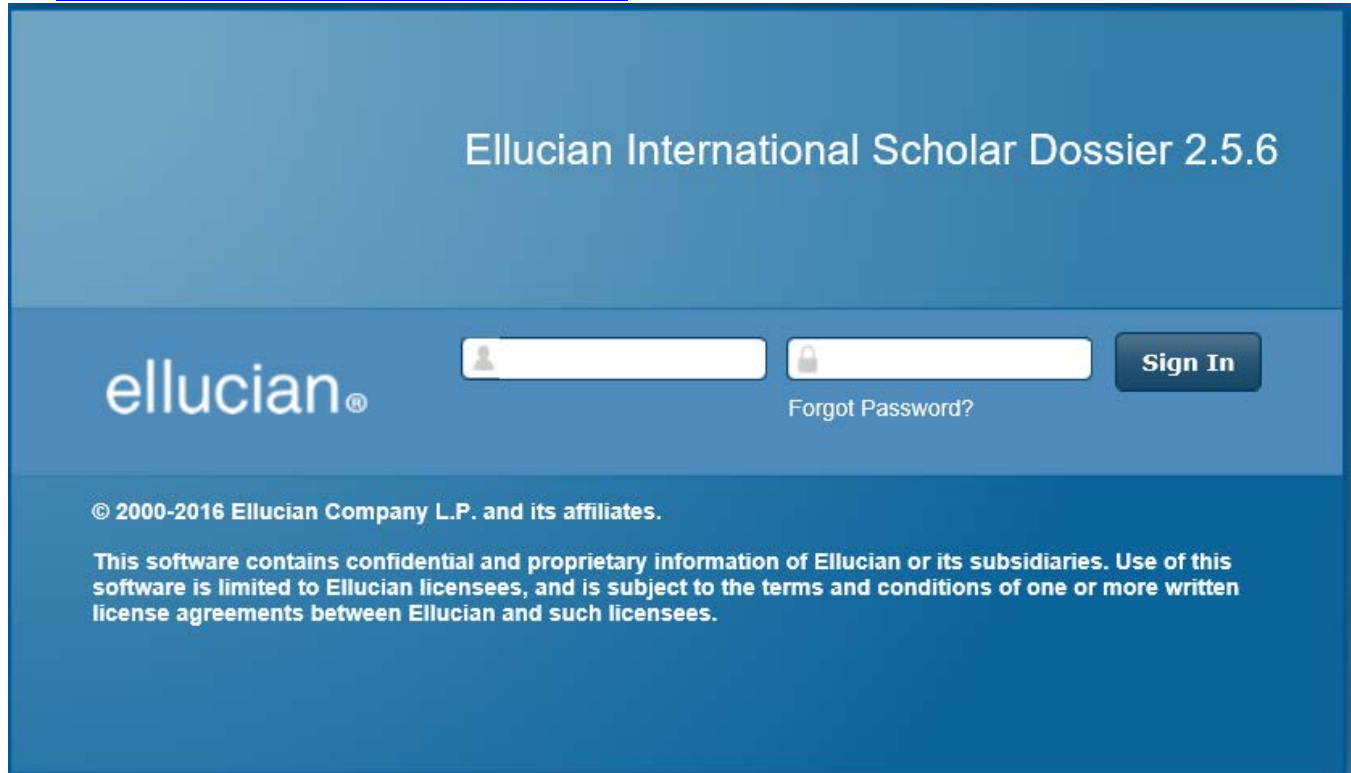
Tips for Success

- **ISD Manual.** We recommend keeping the online version of this manual open in a browser window each time you use ISD, so that you can utilize links to resources and appendices and copy and paste information as needed.
- **Browser Compatibility.** ISD is compatible with Microsoft Internet Explorer 10 or 11, with latest service pack(s) OR Mozilla Firefox 34 or higher. ISD is not compatible with other browsers.
- **Change Password and Enter a Security Question.** After logging in for the first time, click on **My Account** (top right of Welcome Page) and change your password and security question to something that you will be able to remember. Enter a security question and answer so that you will be able to reset your password in case you forget it or get locked out of the system. If you have forgotten your password and security question, **contact [Katie Rossi](#) to reset your password.**
- **Duplicate Records.** When adding a new record to ISD, if the system recognizes that it may be a duplicate, you will be brought to a screen that reads “**The following record already exists in International Scholar Dossier database that might be a possible match with the visitor that you're trying to add.**” If this happens, **DO NOT** SELECT “CONTINUE”. This will cause more work and will cause technical problems. Instead, **please click [Cancel](#)**, and email internationaloffice@harvard.edu with the scholar’s passport name, date of birth, and current email address, and the name of the host department.
- **Save Each Section.** Click **Save** after completing each section. After 5 minutes of inactivity, ISD will automatically time out and will not save your information unless you have clicked **Save**. We recommend having all of the scholar’s information in front of you before you begin to input into the ISD system.
- **Required Fields.** Fill in all required fields marked with a red asterisk (*).
- **Visitor vs. Department ISD URL.** The web page address (URL) for the scholars is not the same as the one for you. Do not send the scholar the web address that you use for ISD.
- **Scholar’s email.** Make sure that the email address of the scholar is correct. If it is not, the scholar will not receive necessary instructions and information.
- **Password Errors.** If a scholar is having problems logging in, the most common reason is a password error. The easiest way to avoid this is for the scholar to copy and paste the automatically-generated password from his/her invitation email. Please note that when copying the password from the invitation email, there is often an extra space at the end of the password. **Be sure that the scholar is not copying this extra space.**
- **Error Messages.** If you receive an error when submitting a record to the HIO, contact Katie Rossi by [email](#) or phone at 617-496-2813.

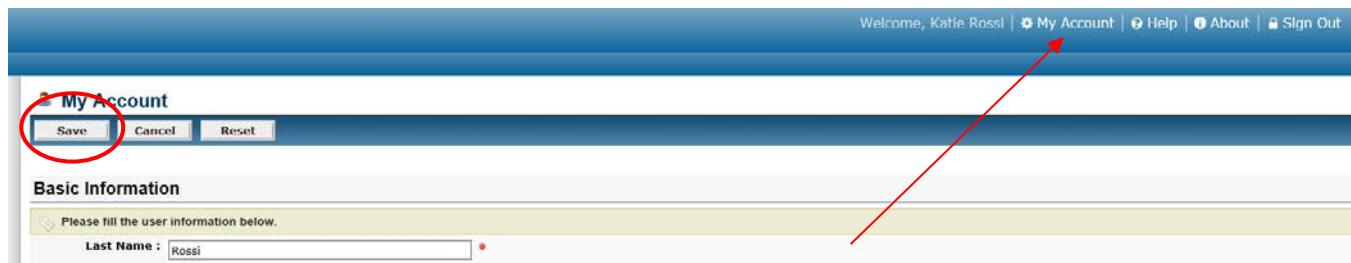
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Logging In and Updating Your Password

1. **Log in** to ISD with the username and password provided in the email sent to you by Katie Rossi after contacting your HIO Advisor. The URL for ISD Department Login is:
<https://hioisdadmin.hio.harvard.edu/Login.aspx>



Note: This web site is only for authorized departmental users. Please do not provide the above link to the international scholars. They will use a different link to log in.



2. After logging in for the first time, click on **My Account** (top right of Welcome Page) and change your password and security question to something that you will be able to remember. The security question will allow you to get your password in case you forget it or get locked out of the system. **Click Save before proceeding to the next Tab.**

3. Remember to click **Save** to save the changes.

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The Welcome Page

Once you have successfully logged into ISD, you will be directed to a Welcome Page that has links to useful tools including the email for [Inviting a Visitor](#) and the ISD Administrator Manual.

Home

Administration

- Manage Users
- Manage Advisors
- Configure Academic Department
- Manage Form Templates
- Mass Reassignment
- Configure International Scholar Dossier

Record Manager

- Search for Visitor
- Add Visitor



ISD INSTRUCTIONS FOR DEPARTMENT ADMINISTRATORS

Important: ISD is used only for new incoming scholars who have not attended Harvard University before, either under our sponsorship or third-party sponsorship. If your scholar was at Harvard before, you must complete the [eForm](#) and email it to the HIO (internationaloffice@harvard.edu).

To create an ISD record for a new scholar, follow the instructions below:

- Click "Add Visitor" under Home in the left margin. Leave Middle Name blank. Enter First and Middle Names in the First Name field. Under Visitor Permissions, check off "Read/Write."
- Go to the "Tasks" tab and invite the scholar using the email that is populated with the login and password.
- Add the following text to the email and copy yourself:

Dear [Scholar Name],

Welcome to Harvard! The Harvard International Office (HIO) uses the International Scholar Dossier (ISD) online system to obtain the necessary information to assist with your immigration needs for your upcoming time at the University. The link to your ISD login page and your login credentials should be at the very bottom of this email. **Please do not schedule a visa interview appointment at a U.S. Embassy or Consulate until you have obtained the necessary paperwork from the HIO.**

NOTE: Please use only Internet Explorer (version 10 or 11) or Mozilla Firefox (version 34 or higher) to enter your information in ISD. Please email me when you have completed your information in ISD.

The HIO will need the following information from you in order to process the necessary visa paperwork for you. Please review and complete any missing information in the following fields and upload previous visa documents you may have. All fields are required. Failure to reply to all questions will result in delays in the HIO processing. Do not skip any fields. If certain questions/information do not apply to you, enter "N/A."

Please make sure to fill out the following tabs:

- Biographical
- Address (please enter your permanent residential address as well as the mailing address which will be used for mailing your documents)
- Funding (if not funded by Harvard or Harvard-affiliated hospital)
- Position in Home Country
- Passport and Visa Information
- Education
- Dependents (if applicable)

Please make sure to upload supporting documents:

- Passport
- Current Visa documents, if applicable (EAD/Visa stamp, I-20, DS-2019 form, I-797)
- Funding documentation (if not funded by Harvard or Harvard-affiliated hospital please include bank statements or scholarship/salary information)
- Copy of your latest/most current degree

NOTE: All supporting documents must be in English. If the supporting document is not in English, please provide a translation.

Once you have completed your sections, please email me. I will review and submit your record to the HIO to get the visa paperwork processed. After you arrive at Harvard, you must register at the HIO in Cambridge before you come to meet me.

Let me know if you have any questions.

Thank you,
[Department Admin Name]

For technical difficulties, please contact Kathryn Rossi at Kathryn_Rossi@harvard.edu.

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3. Campus ID field should be left blank. Campus should be “Harvard University.”
4. Department’s name should be selected from the Academic Department pull-down menu.
5. User Name for the Scholar must be unique and is chosen by the Department Administrator. Using the first part of the scholar’s email address (before the “@” symbol) will ensure the User Name is unique.
6. **Please remember to check that the scholar’s Email Address field is correct.** The address entered in this field will be the destination of the message you will send containing a password that will allow the incoming scholar to access ISD. **Do not use your own email address in this field.**
7. Select “Read/Write” for the Scholar’s Permission to allow the scholar to edit personal information in ISD.
8. *Click **Save** so that the record is successfully added to the ISD system.*

Duplicate Records

ISD will now check if there is a record in the HIO ISSM database with the same name that you have entered. A record may exist in the following circumstances:

- a. The scholar is currently at Harvard either at the same or a different department;
 - b. The scholar was previously at Harvard as a scholar either in the same or a different department; OR
 - c. The scholar was previously at Harvard as a student.
1. If you receive the message below, click **Cancel**. **DO NOT CLICK LAST NAME OR CONTINUE.** This would require unnecessary work on your part and will create data discrepancies.

Attention	Last Name	First Name	Date of Birth	Campus Id	Academic Department	Status
False	Manual	ISD			Astronomy (FAS)	Active

Continue Cancel

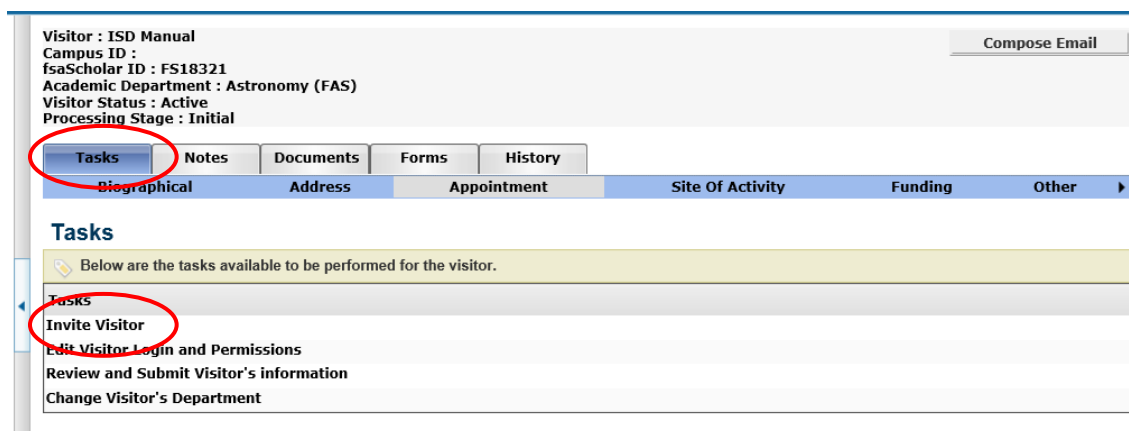
2. Send an email to internationaloffice@harvard.edu to report the duplicate record and receive instructions on how to proceed. See below for more details. When you come to the Duplicate Records Found screen, click **Cancel**, and exit the record.
 - a. Email internationaloffice@harvard.edu with the subject header “Duplicate ISD Record for [insert name of scholar]” and explain you may have a duplicate ISD record.
 - b. In the text of the email include:

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- i. Passport name of scholar
 - ii. Date of birth of the scholar
 - iii. Current email address for the scholar
 - iv. Name of the department/unit requesting the ISD record
 - v. Dates of appointment
3. The HIO will reply to your email with instructions on how to proceed.

Inviting a Visitor

1. After you have added the record, you will need to click on the **Tasks** tab in the ISD Action Bar and click **Invite Visitor**.
 - a. The invitation process will generate an email with the scholar's email address prefilled. **Enter your own email address in the "CC:" field so you will have access to the scholar's temporary password and be able to assist with any problems logging into ISD.**
2. When you click **Invite Visitor**, a blank email message will appear with the scholar's email address pre-filled. The e-mail message that the scholar receives will have two parts:
 - a. The first part will include what you type in the body of the message. **Please use the [template email provided in the manual and on the Welcome Page of the ISD website.](#)**
 - b. The second part is added automatically by the system and will contain the username, password and the URL to the ISD visitor site.



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Tasks	Notes	Documents	Forms	History
Biographical	Address	Appointment	Site Of Activity	

Invite Visitor

Please enter your email information below.

To :

Cc :

Bcc :

Subject :

Body :

Dear

Welcome to Harvard! The Harvard International Office (HIO) uses the International Scholar Dossier (ISD) online system to obtain the necessary information to assist with your immigration needs for your upcoming time at the University. The link to your ISD login page and your login credentials should be at the very bottom of this email. **Please do not schedule a visa interview appointment at a U.S. Embassy or Consulate until you have obtained the necessary paperwork from the HIO.**

NOTE: Please use only Internet Explorer (version 10 or 11) or Mozilla Firefox (version 34 or higher) to enter your information in ISD. Please email me when you have completed your information in ISD.

The HIO will need the following information from you in order to process the necessary visa paperwork for you. Please review and complete any missing information in the following fields and upload previous visa documents you may have. All fields are

Design HTML Preview

3. Clicking **Send** will send the email message to the scholar. You will see a confirmation like the one below that the email was sent successfully.

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

Invite Visitor

Email successfully sent to 'kathryn_rossi@harvard.edu'

Dear ISD Manual, Welcome to Harvard! The Harvard International Office (HIO) uses the International Scholar Dossier (ISD) online system to obtain the necessary information to assist with your immigration needs for your upcoming time at the University. The link to your ISD login page and your login credentials should be at the very bottom of this email. Please do not schedule a visa interview appointment at a U.S. Embassy or Consulate until you have obtained the necessary paperwork from the HIO. NOTE: Please use only Internet Explorer (version 10 or 11) or Mozilla Firefox (version 34 or higher) to enter your information in ISD. Please email me when you have completed your information in ISD. The HIO will need the following information from you in order to process the necessary visa paperwork for you. Please review and complete any missing information in the following fields and upload previous visa documents you may have. All fields are required. Failure to reply to all questions will result in delays in the HIO processing. Do not skip any fields. If certain questions/information do not apply to you, enter "N/A." Please make sure to fill out the following tabs: Biographical Address (please enter your permanent residential address as well as the mailing address which will be used for mailing your documents) Funding (if not funded by Harvard or Harvard-affiliated hospital) Position in Home Country Passport and Visa Information Education Dependents (if applicable) Please make sure to upload supporting documents: Passport Current Visa documents, if applicable (EAD/Visa stamp, I-20, DS-2019 form, I-797) Funding documentation (if not funded by Harvard or Harvard-affiliated hospital please include bank statements or scholarship/salary information Copy of your latest/most current degree NOTE: All supporting documents must be in English. If the supporting document is not in English, please provide a translation. Once you have completed your sections, please email me. I will review and submit your record to the HIO to get the visa paperwork processed. After you arrive at Harvard, you must register at the HIO in Cambridge before you come to meet me. Let me know if you have any questions. Thank you, Katie

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4. The scholar will receive your custom message and at the bottom of the email, ISD populates the username you selected as well as a system-generated password. **Since you have added yourself as a CC on the email, you will also receive this email with the scholar's login credentials. So, if the scholar has any difficulty receiving the email, you will be able to provide them with their login credentials.** The scholar will now use this information to log in and complete his or her part of the process.

NOTE: All supporting documents must be in English. If the supporting document is not in English, please provide an English translation.

Once you have completed your sections, please email me. I will review and submit your request. After you arrive at Harvard, you must register at the HIO in Cambridge before you come to the office.

Let me know if you have any questions.

Thank you,
Katie

Please use the below username and password information to login into the url specified
URL = <https://hioisdvisitor.hio.harvard.edu/Login.aspx>
UserName = ISDManual
Password = (GKVPm-L/=5_ss

PLEASE NOTE - the ISD URL for the scholar is different from the one used by you as the Administrator:

Administrator URL: <https://hioisdadmin.hio.harvard.edu/Login.aspx>

Visitor URL: <https://hioisdvisitor.hio.harvard.edu/Login.aspx>

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Editing and Updating Information in the Scholar Data Bar

There are 11 sections within the ISD Data Bar in the Department View: Biographical, Address, Appointment, Site of Activity, Funding, Position in Home Country, Passport and Visa, Education, Current US Institution, Dependent-Specific, Dependent-General.

Some information may be completed by the scholar, and reviewed by the department. The following tabs cannot be viewed by the scholar and must be completed by the Department Administrator: Appointment, Site of Activity, and Funding tabs.

Visitor : ISD Manual
 Campus ID : Compose Email
 fsaScholar ID : FS18321
 Academic Department : Astronomy (FAS)
 Visitor Status : Active
 Processing Stage : Invited

Tasks | Notes | Documents | Forms | History

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

Save | Reset

- Position In Home Country
- Passport And Visa
- Education
- Dependent-Specific
- Dependent-General

Biographical Information

Tab	Dept. Administrator Completes	Scholar Completes
Biographical		✓
Address		✓
Appointment	✓	
Site of Activity	✓	
Funding	✓	
Position in Home Country		✓
Passport and Visa		✓
Education		✓
Dependent – Specific		✓
Dependent – General		✓

NOTE: Please refer to the respective manual sections for each tab for more details about which specific fields are required and how they must be completed.

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Instructions for Tabs

1. **Biographical Tab:** The biographical information will be entered by the visitor. Review and edit as necessary.
2. **Address Tab:** There are three Address Types. All types are required. This information will be entered by the scholar.
 - a. “Local” - If a visitor has a U.S. address, please indicate the U.S. residential address under local address. Please do NOT indicate a P.O. box or department address as the scholar’s local address.
 - b. “Permanent” (required for all cases) - The scholar should enter their home country address. The permanent address must be an address outside of the U.S.
 - c. “Mailing” - The address to which the documents should be sent should be entered in this field by the scholar, along with the scholar’s email address and phone number.
3. **Appointment Tab:**
 - a. Select the “School Name” from the drop-down menu.
 - b. Specify the “Appointment Start Date” and “Appointment End Date.”
 - c. Select the “Harvard Appointment Title.” Select the appropriate academic appointment title that the scholar will hold while at your department.
 - d. Specify the “Hospital Title” if the scholar’s appointment will be at a hospital.
 - e. Specify whether the appointment will be less than 6 months.
 - f. Specify whether it is possible the appointment will be renewed or extended.
 - g. For J-1 scholars, “Select J-1 Category.” Select one of the following: “Research Scholar,” “Short-Term Scholar,” or “Student Intern.”
 - i. **If the scholar is currently enrolled in a Bachelor’s degree (BA, BS, MBBS) program at a university abroad, the only category for which he or she is eligible is the J-1 Student Intern. Please refer to the [Appendix E](#) for additional information and instructions pertaining to that category.**
 - ii. If the scholar has obtained a Bachelor’s degree but will be here for less than six (6) months, the scholar may prefer a J-1 Short-Term Scholar visa. Do not submit the ISD

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record until you have contacted the scholar and determined whether they prefer the J-1 Research Scholar category or the J-1 Short-Term Scholar category.

1. Please contact the scholar directly using the [email included in the Appendix](#). Copy and paste the email chain including this message and the scholar's response into the **Notes** tab.
 2. Select the correct visitor category (J-1 Research Scholar or J-1 Short-Term Scholar) that corresponds to their preference.
- h. The "Subject Field Code" should reflect the area of research or teaching in which the scholar will engage while at Harvard. Department Administrators should use the CIP code assigned by the HIO advisor with whom you work. This information will be provided in the email that includes your ISD login credentials. If you are unable to locate this email, please contact [Katie Rossi](#) for assistance.
- i. Fill in your school affiliation and department. Ex., *FAS: Economics*.
- j. Specify the number of hours that the scholar will work per week.
- k. In the **Field of Research or Teaching**, enter a brief description of what the scholar will be researching or teaching while at Harvard.
- l. Indicate whether the primary activity is Research or Teaching. If the visitor will be engaging in both, indicate which will be the primary activity.
- m. Complete numbers 01-12 in **Custom Appointment Information** section.
- n. **English Language Proficiency (ELP) Verification:** Per U.S. Department of State regulations, scholars must have "sufficient proficiency in the English language, as determined by an objective measurement of English language proficiency, successfully to participate in his or her program and to function on a day-to-day basis." [22 CFR 62.10(a)(2)]
- i. Please maintain the [ELP form](#) in the scholar's file within your office.
 - ii. For additional information about ELP requirements, please refer to [Appendix D](#).
- o. Specify whether you have completed any notes in the Notes Tab.
- p. If the appointment will be at a hospital, complete the "Hospital" and "Hospital Patient Contact" fields.
- q. **Mailing Instructions:** The HIO recommends that J-1 DS-2019s be sent to scholars using FedEx. Please select "FedEx" from the drop-down and upload a PDF FedEx airbill generated from your department account to the Documents tab.

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4. Site of Activity: Click Add New

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

Site Of Activity

Add New

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

Site of Activity Name	Site Address	Primary Site
No Site of Activity Found		

- You can use the “Prefill Site of Activity” to prefill the following information, if your department has a listing in the drop-down menu.
- Select “Yes” for the scholar's primary site of activity.
- In “Street Address,” enter the address where the research/teaching will take place. Include the room number and building if a campus address is used.
- In “Name of Site, Dept. or Building,” enter "Harvard University Campus" (if activity will take place on campus).
- In “Site Address,” enter the name of the hosting department or research unit.
- Enter the “City,” “State,” and “Postal Code.”
- Click **Save**.
- If there will be multiple sites of activity, after saving,, click **Add New** to add a new site of activity. Include all sites (including address and zip code) at which the job will be performed for a regular periods of time. Notify the HIO of any changes in job site.

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Site Of Activity Information

Site Of Activity Fields Data

To be entered by the department administrator

The site of activity should be the main address of the academic department. If the department is located at multiple sites on the campus, it is not necessary to give specific building or room information. For example, the main address for the Department of Chemistry and Chemical Biology is 12 Oxford Street. This main address is sufficient, even if the scholar will be located at one of the surrounding buildings.

The Site of Activity name must not contain non alpha numeric values

If the scholar will not be working on the Harvard campus (for example, at the FermiLab in Chicago, IL), enter the address where the scholar will be located.

THIS FIELD IS REQUIRED TO PROCESS THE RECORD

Pre-fill Site of Activity	Harvard University GSAS
Primary Site	Yes
Street address	Harvard University GSAS
Name of Site, Dept. or Building	1350 Massachusetts AVE
Site Address (School or Department)	RM 350
City	Cambridge
State	MA
Postal Code	02138
Zip Routing Code	

Custom Fields Data

No Custom Fields Found

Save Reset

NOTE: There are specific formats that you and the scholar must use for addresses.

1. Please refer to [these guidelines](#) for overall address formatting.
2. Please refer to [these guidelines](#) for correct address abbreviations.

5. Funding (For J-1 Cases only):

All funding must be guaranteed, and funding documentation must be reviewed by the Department Administrator. Department Administrators are responsible for verifying funding sources and totals if the scholar will receive non-Harvard funding.

The HIO reserves the right to request and review funding documentation to ensure clarity and consistency between said funding documentation and the HIO-issued J-1 DS-2019 document.

- a. Funding Documentation and Entry Requirements:
 - i. All funding support documentation must be in English or accompanied by an English translation.
 - ii. All funding information entered into ISD must be converted to U.S. dollars. Currency converters are available online at the following websites:
 1. <https://www.oanda.com/currency/converter/>

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2. <http://www.xe.com/currencyconverter/>
- iii. All dollar amounts must be entered without commas or periods, and must be rounded to the nearest whole dollar. For example, \$15,459.87 should be entered as 15460.
- iv. Funding documents must also clearly state the period of time that they cover.
 1. The funding listed must cover the start date through the end date of the Form DS-2019. For example, if someone will receive \$50,000/year and you are requesting a 3-year DS-2019 document, enter "150000".
- v. Funding documents must have been issued within the past three (3) months.
- vi. If any funding is coming from an outside source, please enter that information under "Other Organization Funds." It is of critical importance that the HIO receives complete and accurate funding information from the department. If any component of the scholar's funding will be provided as an award to the scholar and in that scholar's name, it must be listed separately on the funding tab even if that funding will be distributed to the scholar as part of his or her Harvard salary/fellowship payments. Failure to disclose funding awarded to the scholar and in the scholar's name from external resources can have negative and long-lasting, or sometimes permanent and irreparable, implications for the scholar's J-1 status. If you are unsure as to how certain funding should be indicated in the funding tab, please contact your HIO Advisor for assistance.
- vii. When filling in the Other Funds field, list funding source and amount in the description box.
 1. If there are multiple sources, please list them in the description box using the following format: name of funding source (funding total). For example: University of Berlin (8500), Stockholm School of Economics (5000). The sum of these amounts (13500) should be listed in the Other Funds field.
 2. Click **Save**.

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Please refer to the below table for more information about types of funding.

Heading	Field Name	Instructions	Examples of Documents to be Reviewed by Dept.
Program Sponsor Funds	Program Sponsor Funds (HU issues check)	Enter total amount of funds to the scholar will receive from an HU source	The appointment letter/memo signed by a dean with appointment dates, salary, percentage, and title.
	Type of funding (HU salary, grant, honorarium, per diem, or endowment)	State whether the funding is a salary, grant funds, honorarium, per diem, or endowment.	
Government Funds	Home Government funds (in USD)	Enter total amount of funds the scholar will receive from their home government.	Official award letter/document on letterhead with amount in USD, dates, and any other parameters of the agreement. If amount is given in a foreign currency, check currency to obtain the total in USD.
	Name of government organization		
Other Organization Funds	Other organization funds (in USD)	Enter amount of funding supplied by an outside source as the scholar's employer or third-party organization	Official award letter/document on letterhead with amount in USD, dates, and any other parameters of the agreement.
	Name of organization		
Personal Funds	Personal Funds (in USD)	Enter total amount of funds from the scholar or private individual's personal funds	Review bank statement
	Sponsor's relationship to visitor (i.e. parent, spouse, etc.)		

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6. Position in Home Country:

- a. The scholar must indicate his/her position in the **country of Legal Permanent Residence**. The scholar should select the position from the pull-down list that most closely describes their current position in their country of Permanent Residence.
 - i. If the scholar is a student, he/she should indicate either "University Undergraduate Student" or "University Graduate Student."

7. Passport and Visa:

The visitor will have completed the Passport and Visa fields. All of the fields in the Passport and Visa information tab are required. Do not submit the ISD record to the HIO until all information in all fields on this tab has been completed. Before submitting to the HIO, the department should complete/verify the following fields:

- a. **Has the scholar ever been to the US in J status? If yes, upload all previous DS-2019s** If the scholar has ever been in the U.S. in J status, upload copies of the previous Forms DS-2019 in the **Documents** tab. If this is a repeat visit and you have questions about the scholar's eligibility for J status or H-1B, contact your HIO advisor for assistance.
- b. **Is the scholar currently subject to the J-1 2-year (212e) home country residency requirement?**
Indicate "No" if the scholar has:
 - i. Never been in the U.S. in J status;
 - ii. Never been subject to the 2-year (212e) residency requirement; **OR**
 - iii. Received a waiver of the requirement.
- c. **Has the scholar ever received a waiver recommendation of the 2-year home country residency requirement from the U.S. Department of State?** If the scholar has applied for a waiver of the 2-year home country residency requirement **OR** has received a waiver recommendation from the U.S. Department of State, enter "yes." Please have the scholar upload a screenshot of their 212(e) waiver case status from the DOS website **OR** a copy of their DOS waiver letter and/or DHS approval notice.
- d. **Does the scholar have a petition for U.S. permanent residency (green card) pending?** If the scholar has applied for U.S. legal permanent residence (green card), contact your HIO advisor for assistance.

8. Scholar will complete the **Education, Dependent – Specific, and Dependent – General** tabs.

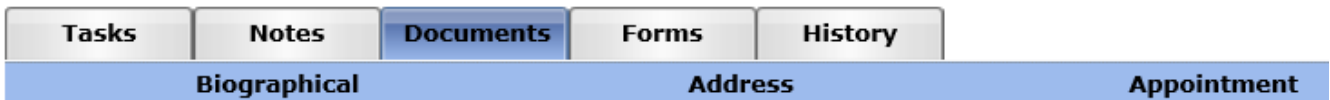
ISD ADMINISTRATOR MANUAL

Attaching Documents

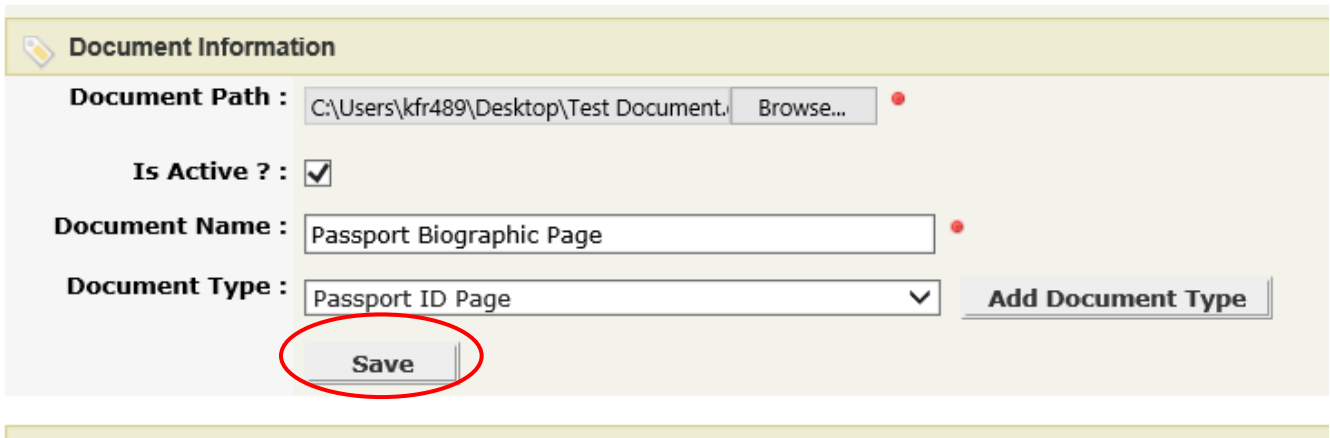
Before submitting an ISD record to the HIO, all required documents must be uploaded.

Please refer to the [Scholar Document Checklists](#).

1. Click on the **Documents** tab from the ISD Action Bar.
2. Click **Browse** to locate the file you will upload and select the document.
3. Click **Document Name** and enter a description of the document (i.e. "New Initial J-1 Bundle").
4. Click on **Document Type** drop down menu. Scroll down to select the type of document.
5. Click **Save**.



Document Attachments

A screenshot of the 'Document Information' form. The form has a title bar with a document icon and the text 'Document Information'. Below the title bar are four fields: 'Document Path' with a text box containing 'C:\Users\kfr489\Desktop\Test Document.' and a 'Browse...' button; 'Is Active?' with a checked checkbox; 'Document Name' with a text box containing 'Passport Biographic Page'; and 'Document Type' with a dropdown menu showing 'Passport ID Page' and a downward arrow. To the right of the dropdown menu is a button labeled 'Add Document Type'. At the bottom of the form is a 'Save' button, which is circled in red.

PLEASE NOTE: Attached documents cannot be larger than 4 MB. You also cannot add more than 100 MB of files at one time.

The following are acceptable file formats:

- Adobe Acrobat files (*.PDF) – *preferred*
- Bitmaps (*.BMP)
- Microsoft Word documents (*.DOC, *.DOCX)
- CompuServe Graphics Image Files (*.GIF)
- JPEG files (*.JPG)
- Text files (*.TXT)
- Excel spreadsheets (*.XLS)
- Zipped files (*.ZIP)

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Checklist of Required Scholar Documents

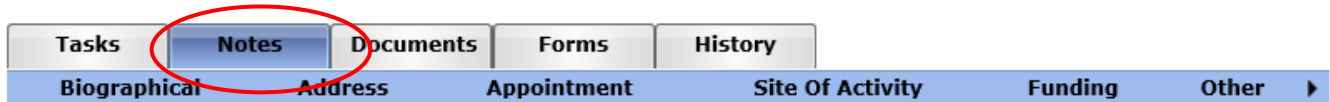
<p><u>New J-1 Requests</u></p> <p>Include copies of the following:</p> <ul style="list-style-type: none">○ Biographical page of passport <i>Showing name, date of birth, and barcode</i>○ Biographical page of dependents' passports (if applicable)○ Proof of legal permanent residence (LPR) <i>If country of LPR is different from citizenship, that documentation must be translated into English.</i>○ All previous DS-2019s and J-1 visa stamps (of scholar and dependents) <i>If scholar has been in J status before, upload all previous DS-2019 and J-1 visa stamp copies.</i>○ Offer/appointment letter○ PDF FedEx label (if document is being shipped via FedEx) <p><u>If scholar is transferring from another institution, please also include the following:</u></p> <ul style="list-style-type: none">○ Harvard Transfer-in Form for Scholars <i>Form must be completed by the Scholar and the International Scholar Advisor at their current institution.</i>○ Copy of DS-2019 from current institution	<p><u>F-1 OPT Scholars</u></p> <p>Include copies of the following:</p> <ul style="list-style-type: none">○ Biographical page of passport○ Employment Authorization Document (EAD)○ I-94 record, which can be retrieved from www.cbp.gov/i94 using scholar's passport information○ F-1 Visa Stamp○ Current I-20○ Offer/appointment letter <p><u>Third-party Sponsored Scholars (e.g. Fulbright Scholars)</u></p> <ul style="list-style-type: none">○ Biographical page of passport○ J-1 Visa Stamp○ Current DS-2019○ Offer/appointment letter
--	---

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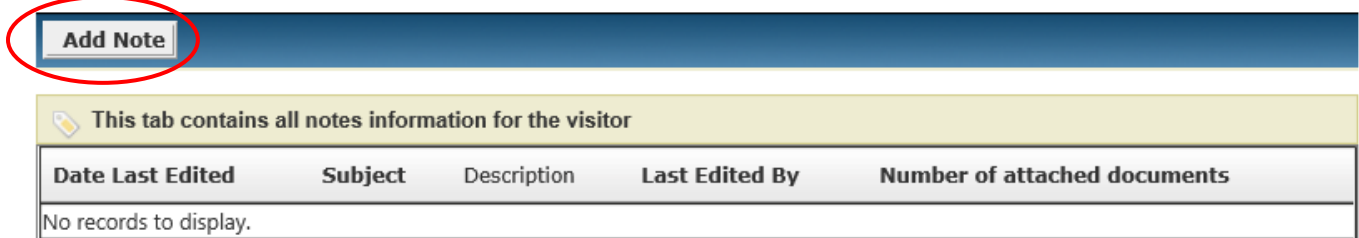
Adding Notes

The Notes tab is used to:

- Inform the HIO about the type of request being submitted
- Add comments or questions about the scholar's case
- Specify if an advisor at the HIO has already been involved in the case



Notes



1. From the **Notes** tab in the ISD Action Bar, click **Add Note**:
2. If the scholar will be traveling internationally add a note with travel information.
3. If there is any additional information you would like to include about this scholar include this in the description as well.

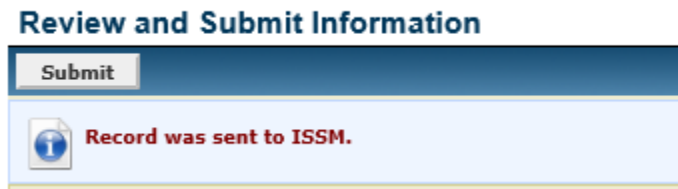
A screenshot of the 'Basic Note Information' form. The 'Subject' field contains 'New J-1' and the 'Description' field contains 'Scholar travelling abroad on 02/01/2018.'. Both fields are highlighted with a red circle. The form has 'Save', 'Cancel', and 'Reset' buttons at the top and bottom.

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Review and Submit Process

Once all required information and documentation has been provided, the ISD record should be submitted to the HIO.

1. Click on **Tasks** from the ISD Action Bar.
2. Click **Review and Submit Visitor's Information**.
3. Check that the correct profile type is selected (J-1, F-1, TN, H-1B, etc.) and update if needed. The Profile Subtype should always be "Scholar."
4. If all information is correct, click **Submit**. This will send the information to the HIO for processing:
 - a. Once you click **Submit**, you should get a message that states "Record was sent to ISSM."



- b. You can also check that the record has been successfully submitted to the HIO by checking the **History** tab of ISD. The processing stage on the **History** tab will say "Department submitted information to international office."

History

Filter by Event :

This tab contains all history information for the visitor

Date	Event	Description
5/3/2018 3:03:32 PM	Data Submission by Department	Department submitted information to the international office.
5/3/2018 3:03:32 PM	Record Status Update	Visitor's processing stage was updated from "Pending Scholar Data Entry" to "Submitted to International Office".

Processing Stage : Submitted to International Office

Navigation tabs: **Tasks** | **Notes** | **Documents** | **Forms** | **History**

Sub-navigation tabs: **Biographical** | **Address** | **Appointment** | **Site Of Activity** | **Funding** | **Other**

Review and Submit Information

Submit

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

Profile Status <input type="text" value="SEVIS - Pending"/>	Profile Type <input type="text" value="J-1"/>	Profile Subtype <input type="text" value="Scholar"/>	Profile Subtype If Other <input type="text"/>
---	---	--	---

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5. If information was missing, the submission will not go through. The missing fields will be noted in red along with the corresponding tab. Complete the missing information and then review and submit the record.

Review and Submit Information



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

- **School Name in (Appointment Tab)**
- **Appointment Start Date in (Appointment Tab)**
- **Appointment End Date in (Appointment Tab)**
- **Harvard Appointment Title in (Appointment Tab)**
- **Select "Research Scholar" unless visitor is a Student Intern in (Appointment Tab)**
- **Subject field code (as per HIO instructions) in (Appointment Tab)**
- **Fill in your school affiliation and department in this format: FAS:Economics in (Appointment Tab)**
- **Number of Hours Per Week in (Appointment Tab)**
- **Date of Birth in (Biographical Tab)**
- **City of Birth in (Biographical Tab)**
- **Country of Birth in (Biographical Tab)**
- **Country of Citizenship in (Biographical Tab)**
- **Country of Permanent Residence in (Biographical Tab)**


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Editing Visitor Permissions

Once the scholar has entered all of the required information, attached the required documents, and submitted the information to the department, the department should edit the visitor’s permissions to “none”. This will prevent the scholar from altering information that has already been reviewed and submitted.

1. Click on the **Tasks** Tab from the ISD Action Bar.
2. Click **Edit Visitor Login and Permissions**.
3. Check the **None** box (Visitor cannot log into ISD).
4. Click **Save**.


Tasks

 Below are the tasks available to be performed for the visitor.

Tasks
Invite Visitor
Edit Visitor Login and Permissions
Review and Submit Visitor's information
Change Visitor's Department
Confirm Visitor Information

Edit Visitor

Basic Information

 Please fill the basic visitor information below.

Last Name : •

First Name :

Middle Name :


Campus Id :

Status : ▾

Department User : ▾

ISSO Advisor : ▾

Login Information


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

User Name : •

Email : •

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

Visitor Permissions

 Below are the different permission levels available for visitor.

Read/Write (Visitor can modify personal information)

View (Visitor can only view personal information)

None (Visitor cannot log into International Scholar Dossier)

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After Submitting to Harvard International Office

- **After submitting a scholar's information, do not make any further changes to the ISD record.**
- If you need to make changes after submission, please contact your HIO advisor directly for assistance.
- Do not resubmit the record, as this may cause data discrepancies or duplicate records.
- The ten (10) business days' processing time for J-1 cases starts when the complete request has been submitted. You can check the history tab to see when the record was submitted to the HIO.
- If documents are missing or information needs clarification, your HIO advisor will contact you and give you instructions.
- For J-1 cases, once the DS-2019 has been issued and finalized, the HIO will send the document to the scholar using the FedEx airbill uploaded in ISD. The HIO will enter a note in the **Notes** tab when the document has been shipped to the scholar.

History Tab

The **History** tab allows the department and the HIO to review all of the actions taken on the record. These include the creation of the record, the invitation sent to the scholar, processing stage updates, and data and document submissions and edits.

- Visitors cannot view the **History** tab. Only the Department and the HIO have access to this feature.

The screenshot shows a user interface for a visitor record. At the top left, the following information is displayed: Visitor : ISD Manual, Campus ID : , fsaScholar ID : FS18321, Academic Department : Astronomy (FAS), Visitor Status : Active, and Processing Stage : Invited. A 'Compose Email' button is located at the top right. Below this is a navigation bar with tabs: Tasks, Notes, Documents, Forms, History (circled in red), Appointment, Site Of Activity, Funding, and Other. At the bottom of the interface, there are 'Save' and 'Reset' buttons.

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FAQs

How do I complete and upload a FedEx airbill?

To create an electronic airbill, you must create a login with fedex.com using your FedEx Account Number. Detailed instructions for creating the account can be found under the Federal Express Airbills section of the Manual.

When I complete the FedEx form and click Ship - I get an email indicating that the package will be picked up the same day. I don't want it picked up here and it is not clear when it should be at the HIO. What should I do?

You can fix this on the "Prepare Shipment" screen of the FedEx web site under Section 4 (Billing Details). Where it reads "Pickup/Drop-off," you can click "+Edit" and select the option to "Drop off package at a FedEx location."

What is the size limit for files that can be uploaded to ISD?

Attached documents cannot be larger than 4 MB. You also cannot add more than 100 MB of files at one time.

What should I enter for Site of Activity?

The easiest way to enter the Site of Activity is to use the "Pre-fill Site of Activity" drop-down menu. This contains a list of schools, hospitals, and departments at Harvard. After selecting a "Pre-fill Site of Activity," you may need to enter additional information.

For detailed information about entering the "Site of Activity," go to Site of Activity section of the Manual.

What should I enter for Subject/Field Code?

You should use the Subject/Field Code that was sent to you in the original ISD invitation email (six numbers format xx.xxxx) that contained your ISD login credentials. The format used for the Subject/Field Code Remarks is "School: Department", e.g. "HMS: Hospital acronym." Please contact your [HIO Advisor](#) if you have further questions about the Subject/Field Code.

What browser should I use?

ISD is compatible with Microsoft Internet Explorer 10 or 11, with latest service pack(s) OR Mozilla Firefox 34 or higher. ISD is not compatible with other browsers (Safari, Chrome, etc.). If any other browser is used at any point in the process of inviting a visitor, it will cause an error in submission.

I tried to add a visitor and the system indicates that the record already exists in fsaAtlas. What should I do?

If you receive a message indicating that there may be a duplicate record, **do NOT add the scholar**; rather, email internationaloffice@harvard.edu with the passport name of the scholar, their date of birth, the scholar's current email address, and the name of the host department.

Duplicate record(s) found in ISD

The following record already exists in International Scholar Dossier database that might be a possible match with the visitor that you are trying to add. Click on Continue to create a new record. Click on the Last Name link of the record to edit.

Attention	Last Name	First Name	Date of Birth	Campus Id	Academic Department	Status
False	Manual	ISD			Astronomy (FAS)	Active

Continue Cancel

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If the HIO confirms that a record for the person you are inviting already exists in its database, you **should not proceed** with creating an ISD record. Rather, you should use the [HIO eForm](#) available on the HIO website. Click **Cancel** to prevent a new record from being created in ISD.

If your HIO advisor confirms that this is a new visitor, you must proceed by clicking **Continue**.

My scholar never received the invitation with the login name and password. What could be the problem?

First, try using Internet Explorer if you are not already using this browser. Then, check to make sure that the email address of the scholar is correct. If it is not, you should change it by going to: **Tasks > Edit Visitor Login and Permissions**. If the email address is correct, ask the scholar to check his/her spam folder. Sometimes the invitation may be sent there.

You can also re-invite the scholar and enter your own email address into the CC field so that you will receive a copy of the invitation email. That will allow you to forward that invitation to the scholar from your own email. Re-inviting the scholar prompts the ISD system to generate and send a new password via email.

I invited a scholar and s/he is unable to log into the system using the ISD-generated username and password. What could be the problem?

The most common reason for a scholar being unable to log in to ISD is a password transcription error. The easiest way to avoid this error is for the scholar to copy and paste the automatically-generated password from his/her invitation email.

When using the cursor to select the password, there is often an extra space selected at the end. Make sure the scholar is not selecting the extra space when copying the password.

Please note that the web page address (URL) for the scholars is not the same as the one for you. Do not send the scholar the web address that you use for ISD:

Scholar URL: <https://hioisdvisitor.hio.harvard.edu/Login.aspx>

Administrator URL: <https://hioisdadmin.hio.harvard.edu/Login.aspx>

What should I do if my account is locked?

If your account is locked, it will need to be reset. Please click **Forgot password?**

After you click **Reset**, you will receive a new password via email. Please remember to login and then go to **My Account** to change the password. This procedure will work only if you have previously created a security question and answer.

If the procedure above does not work or you never set up a security question and answer, please email [Katie Rossi](#) and she will unlock your account by providing a new system-generated password. We suggest that you copy and paste the new password to avoid errors.

When I tried to submit a record, I received an error. What should I do?

If you receive an error when trying to submit a record to the HIO, contact [Katie Rossi](#).

How do I reset a visitor's password?

1. Click on the **Tasks Tab** of the ISD Action Bar

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2. Click **Edit Visitor Login and Permissions**
3. Check the **Reset Password** box and click the **Save** button.

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

How do I request an extension for a current scholar with my department?

When requesting an extension, DO NOT create a new ISD record, or delete or edit any part of an existing record. This would require unnecessary work on your part and will create data discrepancies. If you need to extend a scholar's current immigration sponsorship, please submit a completed eNED to the HIO email inbox.

Contact the HIO

Immigration Questions: For visa/immigration questions and for questions about how to complete specific sections of the ISD record, you should contact your [HIO Advisor](#).

Technical Questions: For technical questions about use of the ISD system, please contact [Katie Rossi](#).

Duplicate Record Questions: For confirmation as to whether or not an ISD record is a duplicate, please email internationaloffice@harvard.edu with the scholar's passport name, date of birth, and current email address, and the name of the host department.

ISD Website and Manual Feedback: We welcome your input and feedback on ISD and this Administrator Manual. Email [Katie Rossi](#) to provide feedback on how it is working for you.

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Appendix A – Template Email for Inviting a Scholar

Dear *[Scholar Name]*,

Welcome to Harvard! The Harvard International Office (HIO) uses the International Scholar Dossier (ISD) online system to obtain the necessary information to assist with your immigration needs for your upcoming time at the University. The link to your ISD login page and your login credentials should be at the very bottom of this email.

Please do not schedule a visa interview appointment at a U.S. Embassy or Consulate until you have obtained the necessary paperwork from the HIO.

NOTE: Please use only Internet Explorer (version 10 or 11) or Mozilla Firefox (version 34 or higher) to enter your information in ISD. Please email me when you have completed your information in ISD.

The HIO will need the following information from you in order to process the necessary visa paperwork for you. Please review and complete any missing information in the following fields and upload previous visa documents you may have. Failure to submit complete information will result in delays in the HIO processing.

Please make sure to fill out the following tabs:

- Biographical
- Address (please enter your permanent residential address as well as the mailing address which will be used for mailing your documents)
- Funding (if not funded by Harvard or Harvard-affiliated hospital)
- Position in Home Country
- Passport and Visa Information
- Education
- Dependents (if applicable)

Please make sure to upload supporting documents:

NOTE: All supporting documents must be in English. If the supporting document is not in English, please provide a translation.

- Passport
- Current Visa documents, if applicable (EAD/Visa stamp, I-20, DS-2019 form, I-797)
- Funding documentation (if not funded by Harvard or Harvard-affiliated hospital please include bank statements or scholarship/salary information)
- Copy of your latest/most current degree

Once you have completed your sections, please email me. I will review and submit your record to the HIO to get the visa paperwork processed. After you arrive at Harvard, you must register at the HIO in Cambridge before you come to meet me.

Let me know if you have any questions.

Thank you,
[Department Admin Name]

Appendix B – Template Email for Choosing a J-1 Category

Hello,

I am working on finalizing the immigration sponsorship request to submit to the Harvard International Office (HIO). There are two possible J-1 visa categories for which you are eligible. Please review the information below, and reply to this e-mail indicating which J-1 category you prefer:

J-1 Short-Term Scholar: *This immigration sponsorship category is for a maximum of six (6) months. At the end of that time, it is not possible to obtain an extension. The scholar must depart the U.S. The advantage of this category is that the scholar may return to the U.S. at any time in another J status after departing. (Consecutive stays as a J-1 Short-Term Scholar are not permitted.) Additional information about this category is available on the [HIO website](#). Please refer to the drop-down section entitled “Categories.”*

J-1 Research Scholar/Professor: *This is an immigration sponsorship category that can be extended for up to five (5) years with no time gaps. The scholar must stay in the country the entire time, except for brief trips out of the U.S. for business or pleasure. Additional information about this category is available on the [HIO website](#). Please refer to the drop-down section entitled “Categories.”*

Once the J-1 Research Scholar or Professor departs the U.S., he/she cannot return to the U.S. for two (2) years in J-1 Research Scholar/Professor category. This is known as the Repeat Participation Bar. Additional information about this restriction is available on the [HIO website](#). Please refer to the drop-down section entitled “12-24 Month Bar.”

The HIO will be able to process the paperwork once I obtain this clarification. If you have any follow-up questions about these requirements, please include them in your response and I will contact the HIO.

Thanks,

Please include your email signature line in this email.

Appendix C – J-1 Exchange Visitor Program Requirements

1. **English language proficiency** – Sponsoring hosts such as the faculty member or PI are responsible for verifying the English language proficiency of the incoming J-1 Exchange Visitor. Department Administrators are responsible for providing information in ISD about the J-1 Exchange Visitor’s English Language Proficiency. Any documentation about English proficiency must be kept in the department in case of an audit. The English Language Proficiency Certification form is available in ISD under the “Appointment” tab.
2. **Offer/Appointment letters** – Sponsoring hosts or Department Administrators must provide the incoming J-1 individuals with a letter that includes all mandatory elements of the job/appointment prior to the arrival of the individual. Information must include, but is not limited to, the following topics: program activities, cultural goals, terms and condition of the employment/appointment, employer’s name and address, duties, length of position, number of work hours/week, wage, if applicable, and insurance costs.
 - a. A template letter may be available from your office of Faculty Affairs or someone who is in charge of academic appointments for your department. Please consult with them and if no letter is available, please contact your HIO advisor.
 - b. This information should be provided to the scholar at the time he or she is invited to the department.
3. **Attach offer/appointment letter to ISD** - Department Administrators are responsible for attaching the letter to ISD under the Document Tab.
4. **Scholar and dependent email addresses** - Department Administrators are responsible for confirming that the email addresses of incoming J visa holders AND their dependents (if applicable) are in ISD.
5. **Verification of financial information** - Prior to the HIO issuing the DS-2019 for the J-1 Exchange Visitor, sponsoring hosts or Department Administrators must verify that the individual has adequate financial resources to participate in and complete their J program at Harvard. Please refer to [above sections](#) for more detail. If you have questions, contact your HIO advisor.
6. **Fees charged to J-1 scholars** - Department Administrators must provide a list of fees to be paid by the scholar, if applicable.
7. **Orientations** - Department Administrators are expected to encourage the scholars to come to the HIO to attend the Getting Started orientation offered regularly throughout the year. Check the HIO website for [orientation schedules](#).
8. **Health insurance** - For additional information about the J-1 health insurance requirements set forth in the U.S. Department of State’s J-1 Subpart A regulations, please refer to the [HIO website](#).

Appendix D – English Language Proficiency (ELP)

Sponsoring hosts such as the faculty member or PI are responsible for verifying the English language proficiency of incoming J-1 Exchange Visitors (postdoctoral/research scholars, short-term scholars, student interns, etc.). Department Administrators are responsible for providing information in ISD about a J-1 Exchange Visitor's English language proficiency.

The HIO has designed the [English Language Proficiency Form](#) to help you document ELP. It must be signed by the hosting faculty member or the PI and must be kept in a scholar's file. The **U.S.** Department of State (DOS) can audit J-1 visa sponsors, and can request the documentation showing proof of ELP. DOS has reminded sponsors "to retain evidence of how they measured applicants' English language proficiency so that it may be made available to the Department upon request." Uniform usage of the English Language Proficiency Form will minimize potential problems and will ensure that Harvard's J-1 Program is compliant.

FREQUENTLY ASKED QUESTIONS REGARDING ELP

1. How do I verify English language proficiency (ELP)?

Federal regulations require sponsors to use one of the following "objective measurements of ELP":

- A recognized English language test;
- Signed documentation from an academic institution or English language school; or
- A documented interview conducted by the sponsor either in-person or by videoconferencing, or by telephone if videoconferencing is not a viable option

2. What is an acceptable recognized English language test?

The two most common English language tests are TOEFL and IELTS. The Graduate School of Arts and Sciences accepts TOEFL results of 80 and above. Several Harvard schools accept IELTS scores of 7 and up. These would be adequate scores for Harvard Exchange Visitors as well.

3. Do we need proof of English test results, or is the scholar's resume or confirmation sufficient?

If you are using test results as evidence of ELP, you must obtain the test results and maintain the documentation in the scholar's file together with the completed and signed English Language Proficiency Form from the faculty member or PI.

4. What is acceptable documentation from an academic institution or English language school?

A diploma, transcript or a signed letter on letterhead are all suitable documentation. You must keep this documentation in the scholar's file, together with the completed and signed English Language Proficiency Form from the faculty member or PI.

5. What is considered an "interview"?

There is no regulatory guidance for interviews. A successful conversation in person, via Skype or via phone would satisfy the requirement. This can be documented on the English Language Proficiency Form.

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6. If we decide to determine ELP through an interview, who can conduct the interview?

Preferably, the interview will be conducted by the faculty member or PI who will be working most closely with the scholar. However, we recognize that another faculty member may have referred the scholar to your department, and if that is the case that faculty member could conduct the interview and complete the English Language Proficiency Form.

7. Is there a recommended time frame from when the interview is conducted and when the scholar will arrive?

There is no recommended time frame, but the interview will need to take place before the ISD record is submitted to the HIO.

8. If a scholar is currently at another U.S. institution in J-1 status and is transferring to Harvard, do we need to document ELP?

Yes. Simply complete the English Language Proficiency Form. Check the “Transfer/Repeat Visitor” box. Use the form to complete the ISD record and then keep the form in the scholar’s file.

9. If a scholar was at Harvard before and will be invited back, do we still need to provide evidence of ELP?

Yes. Check the “Transfer/Repeat Visitor” box in the English Language Proficiency Form and keep the form in the scholar’s file. Complete the eForm and check the appropriate box.

10. What do I have to do if an incoming scholar has earned a degree from a U.S. institution or is from an English speaking country?

If a scholar completed prior study at a U.S. institution or is from an English speaking country, please choose “Other” and specify the scenario on the English Language Proficiency Form and in ISD.

11. How do I complete the questions regarding ELP in ISD?

There are two fields in ISD and both of them are required for successful submission of the record. Question number 14 is a pull-down “English Language Proficiency Verification”, where you must indicate which option(s) were used to assess ELP. Question number 15, “ELP Explanation”, is a write-in field, in which you should enter more specific information about the option you indicated in question number 14. For example, if you choose interview, you need to provide the name of the interviewer. If you choose “Language school”, please provide the name of the school. If you choose “test” please write the name of the test and the test score. If you choose “Other” you need to indicate that the scholar is either sponsored by Fulbright’s J-1 program, a native English speaker or has completed a Ph.D. in an English-speaking country or at an institution where the language of instruction is English.

12. Who should answer questions from incoming scholars regarding the ELP requirement?

It is the responsibility of the hosting department to inform scholars about this requirement, obtain the ELP requirement information, and pass the information to the HIO via ISD.

13. How long should we keep the ELP forms?

You should keep the ELP forms in the scholar’s file for the usual amount of time your department maintains scholar files.

Appendix E – J-1 Student Intern Instructions and Resources

E.1: J-1 Student Intern Eligibility Requirements

The Student Intern category is generally used by individuals enrolled in Bachelor's or joint Bachelor's/M.D. programs. If a student has not yet been awarded a Bachelor's degree, this is the only available J-1 category for which we can provide sponsorship. Additional J-1 categories, such as Short-Term Scholar or Research Scholar, may be available for scholars who have been awarded a Bachelor's degree. Please contact your HIO Advisor for more information.

In order for an exchange visitor to be [eligible](#) for the J-1 Student Intern category, he/she must meet the following requirements:

- Currently enrolled in and pursuing a degree in accredited post-secondary academic institution outside of the United States
 - The U.S. internship must fulfill the educational objectives for the student's degree program at his or her home institution
 - The student must be in good academic standing with their home institution
 - The student must return to their home institution upon completion of the internship
- Must possess [English language skills](#) sufficient to function on a day-to-day basis in the internship environment
- Must have sufficient funding to support entire stay in the U.S.
- Must comply with the requirement of having [health insurance](#) while participating in the J program
- May participate in a student internship program for up to 12 months per degree level

Student Internship Requirements

- The sole purpose of J-1 Student Internship is to promote the educational objectives of the foreign student's current degree program
- The internship must be considered "work-based learning" rather than ordinary employment or unskilled labor
- The J-1 Student Internship cannot be used to fill a labor need or displace any American workers
- Must be full time and meet the minimum of 32 hours per week
- Must be for a minimum of three weeks' duration
- J-1 Student Interns **cannot** participate in any clinical care positions or any other position that involves patient contact. Any work that would require them to provide therapy, medication, or other clinical or medical treatment is prohibited (e.g., sport or physical therapy, nursing, dentistry, veterinary medicine, psychological counseling, social work, speech therapy, or early childhood education)

Helpful Links and Resources

A completed Form [DS-7002/Training/Internship Placement Plan](#) is required to be sent with all J-1 Student Intern ISD record submissions. Please use the [HIO Instructions](#) to assist in filling out the DS-7002.

J-1 Student Interns are required by federal regulations to submit an [evaluation form](#) at the end of their internship to confirm that the program objectives have been met. Please note that internships lasting longer

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than six (6) months will require two evaluations: one at the midpoint and one at the end of the internship. The evaluation must be submitted via email by the intern to the [Harvard International Office](#).

Please visit the [HIO website](#) for more information regarding the J-1 Student Intern category.

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E.2: J-1 Student Intern Checklist

To request a J-1 Student Intern DS-2019 form from the HIO, the ISD electronic record must be completed by the department and the student intern. Department Administrators can reference the [Administrator Guide](#)

Documents & Information to Be Completed by Department Administrator

- Internship Information**
 - Copy of offer letter from department
- Form DS-7002 Training/Internship Placement Plan**
 - **ALL fields** must be answered/completed – please review carefully
 - Page 1 signed and dated by student
 - Page 5 signed and dated by supervisor or PI
 - Page 2 will be signed by the HIO advisor (Leave this page blank.)
- English Language Proficiency (ELP)**
 - HIO Form to verify English language proficiency
- Confirm Delivery/Mailing Preference**
 - Include FedEx or UPS electronic airbill

Documents & Information to Be Completed by J-1 Student Intern

- Biographical Information**
 - Copy of passport biographical page
- Foreign/Mailing Address**
- Current Education/Degree Information to Verify Current Enrollment (*email for template*)**
 - Must reflect good academic standing
 - Must show enrollment in degree program for entire internship period
 - Documentation to show future graduation date that will occur after completion of internship
- Proof of Funding**
 - Example: Bank statements, funding letter, scholarship, grant/award letter, affidavit of support (if funding from parent or relative)
- Prior Visa Documentation (if applicable)**
 - Copies of previously issued visa documents (i.e. F-1, J-1, H-1B, H-4)
 - If student intern has not been issued a prior U.S. visa, no documents are required
- J-1 Student Intern Responsible for Contacting Department When their ISD Sections Are Completed**

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E.3: EIN Table

Harvard/Hospital	EIN	Number of Employees	Workers Comp. Policy
Harvard University	04-2103580	18,740	PMA Management Corp of New England
Beth Israel Deaconess Medical Center	04-2103881	9,800	Self-Insured
Boston Children’s Hospital	04-2774441	10,000	Self-Insured
Brigham & Women’s Hospital	04-2312909	13,984	Self-Insured Partners
Dana Farber Cancer Institute	04-2263040	4,800	The Hartford Insurance
Joslin Diabetes Center	04-2203836	600	Atlantic Charter
Massachusetts General Hospital	04-2697983	15,716	Self-Insured Partners
Mass Eye and Ear Infirmary	04-2103591	2,000	Self-Insured
McLean Hospital	04-2697981	1,459	Self-Insured Partners
Spaulding Rehab Hospital	04-2551124	1,405	Self-Insured Partners

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E.4: Certification of Enrollment and Expected Degree Complete Template

(to be printed on home university letterhead)

Certification of Enrollment and Expected Degree Completion

Name of student:

Date of birth:

Degree Level:

Academic Program/Major:

Expected graduation date: MM/DD/YYYY

This is to certify that the above-named student meets all the eligibility requirements outlined below to participate in a J-1 Student Intern program in the U.S.

- Student is currently "enrolled in and pursuing a degree at an accredited postsecondary academic institution outside the United States." [22 C.F.R. § 62.23(i)]
- The U.S. internship will "fulfill the educational objectives for his or her current degree program at his or her home institution." [22 C.F.R. § 62.23(i)]
- Student is "in good academic standing" at his or her home institution outside the United States. [22 C.F.R. § 62.23(i)(1)(iv)]
- Student will return to his or her university "and fulfill and obtain a degree from such academic institution after completion of the student internship program in the U.S." [22 C.F.R. § 62.23(i)(1)(v)]

I certify that the above statements are true.

Signature:

Printed Name of Authorized University Representative:

Date:

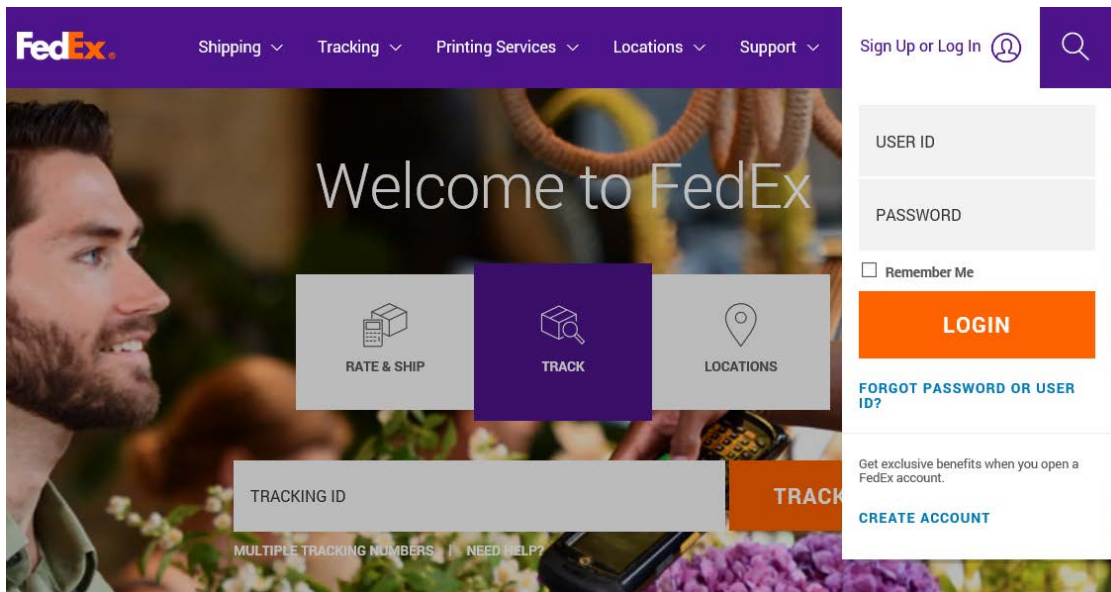
Title:

(Please attach the completed letter to your HIO electronic record along with the other J-1 required documents)

Appendix F – FedEx Instructions

To create an electronic air bill, you must create a login with fedex.com using your FedEx account Number. Instructions for creating the account:

1. Go to fedex.com/us
2. In the top left corner, click **Sign Up or Log In**
3. If you already have an account, enter your “User ID” and “Password.”



4. If you do not yet have an account, click on **Create Account**.
5. Click **View Business Account Benefits**.


Choose Your Account

The 'Choose Your Account' section features two columns. The left column is titled 'Do Business, Get Rewarded' and includes an image of a woman in a red jacket smiling. Below the image is text describing the benefits of a business account, and a blue button labeled 'VIEW BUSINESS ACCOUNT BENEFITS' is circled in red. The right column is titled 'Ship Whatever Life Demands' and includes an image of hands holding a tablet. Below the image is text describing the benefits of a personal account, and a blue button labeled 'OPEN A PERSONAL ACCOUNT' is visible. A small purple icon is also present at the bottom right of the right column.

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6. Click **Open a Business Account**.

Get rewards and discounts with a FedEx business account.



Benefits of opening a business account

Shipping and Printing Discounts

- 16% off FedEx Express
- 8% off FedEx Ground
- 10% off FedEx Office
- 60% off FedEx Freight

Exclusive Offers and Rewards

Join My FedEx Rewards for free and you'll receive goals for shipping and printing. Reach these goals and enjoy a reward

\$10

Special offer to get started

Earn a \$10 gift card when you open a FedEx account, sign up for My FedEx Rewards and complete your first eligible shipment.* Just complete two simple registration steps to start being rewarded.

Open a business account

[Open an account without My FedEx Rewards](#)

7. Enter the requested information.

fedex.com Registration

1 Enter registration information 2 Enter account information 3 Registration confirmation 4 My FedEx Rewards registration

* Denotes required field

Enter Your Registration Information [Help](#)

Contact Information	Login Information
Enter the shipping address you want associated with your login. First name is required.	* Create a user ID <input type="text"/> Use at least 6 characters.
* First name <input type="text"/> Initial <input type="text"/>	* Create a password <input type="password"/>
* Last name <input type="text"/>	Password must use at least 8 characters and contain one upper case letter, one lower case letter and one numeric character.
* E-mail <input type="text"/>	* Re-enter password <input type="password"/>
* Re-enter e-mail <input type="text"/>	* Secret question <input type="text" value="Please select a secret question"/>
* Address 1 <input type="text"/>	* Secret answer <input type="text"/>
Address 2 <input type="text"/>	
* City <input type="text"/>	
* State/province <input type="text" value="Please Select"/>	
* ZIP/postal <input type="text"/>	
* Country/Territory <input type="text" value="U.S.A."/>	
* Phone no. <input type="text"/>	

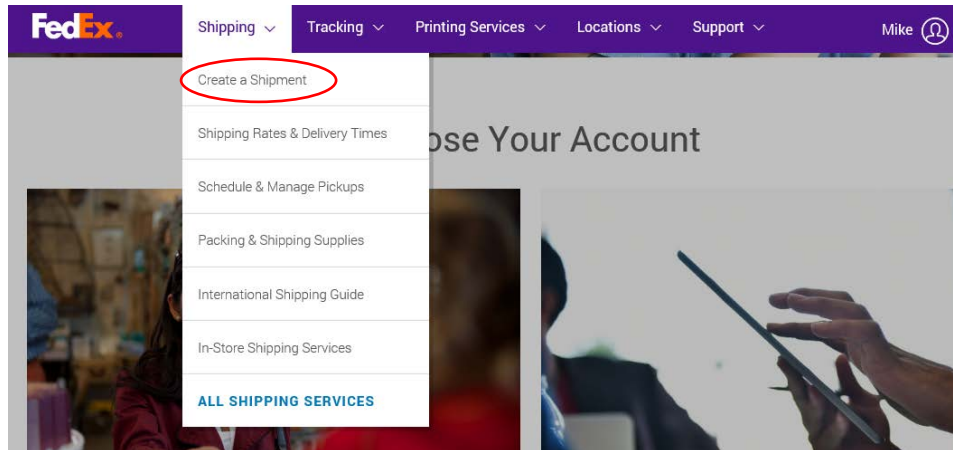
I have read, understood and agree to be bound by the [FedEx.com Terms of Use](#). I also understand how FedEx intends to use my information. [Privacy Policy](#)

Cancel Continue

8. Once you have logged into your account, click **Shipping > Create a Shipment**.

a. *Please note that FedEx will not ship to P.O. Boxes.*

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9. Complete the shipment information for the scholar.

FedEx Ship Manager[®] [My Profile](#) [Logout](#) [Help](#)

Ship | LTL Freight | Ship History | My Lists | Reports | Integration Manager | Administration

Create a Shipment

1 Enter shipping information 2 Print label(s)

* Denotes required field. [Preferences](#) | [Clear all fields](#)

My Shipment Profiles

My shipment profiles (formerly Fast Ship) [Help](#) [Hide](#)

[Ship](#)

1. From

[Help](#) [Hide](#)

Saved senders

* Country/Location

Company

* Contact name

* Address 1

Address 2

* ZIP

* City

* State

* Phone no. ext.

Save as my default address

Save new sender in address book

4. Billing Details

[Help](#) [Hide](#)

* Bill transportation to

Your reference

[More reference fields](#) [Add an account](#)

Special Services (optional)

[Help](#) [Edit](#)

Select additional services for your shipment

Pickup/Drop-off (optional)

[Help](#) [Edit](#)

You are dropping off your package at a FedEx location.

Shipment Notifications (optional)

[Help](#) [Edit](#)

Send an email to yourself, the recipient or others indicating the status of your shipment.

Rates & Transit Times (optional)

[Help](#) [Hide](#)

Amounts are shown in USD

Select	Service and Transit Time	Your Rate
	Click calculate to get rates and transit times.	Calculate

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The screenshot displays the FedEx shipping preparation interface, divided into three main sections:

- 2. To:** This section contains fields for recipient information: Country/Location (United States), Company (Select or enter), Contact name (Scholar Name), Address 1 (Scholar Address), Address 2, ZIP (02138), City (Cambridge), State (Massachusetts), and Phone no. (6174950000). It also includes a link for "Perform detailed address check" and three checkboxes: "This is a residential address", "Save new recipient in address book", and "Save changes in address book".
- 3. Package & Shipment Details:** This section includes fields for Ship date (06/11/2018), No. of packages (1), Pricing option (radio buttons for FedEx Standard Rate and FedEx One Rate), Weight (1.00 lbs), Declared Value (U.S. Dollars), Service type (Standard Overnight), and Package type (FedEx Envelope). There is also an option to "Include a return label".
- 5. Complete your Shipment:** This section has a checkbox for "Create a Shipment Profile" and a link for "Send a Mobile Shipping Label". At the bottom, there are two buttons: "Save for later" and "Ship", with the "Ship" button circled in red.

10. Fill in required information. Enter \$1 for value (if required) and use the current date.

11. Select the service type you prefer. Please note that rates for different service types vary greatly, so be sure to choose carefully. "Standard" or "Economy" shipments are usually good choices, except in very time-sensitive cases.

12. Click **Ship**.

13. If you get an email indicating that the package will be picked up the same day do the following:

- Go to the "Prepare Shipment" screen of the FedEx website under Section 4 (Billing Details). Where it reads "Pickup/Drop-off," you can click **+Edit** and select the option to "Drop off package at a FedEx location."

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14. Confirm shipping details and then click **Ship** again.

Confirm your shipment details

Outbound Shipment Help

From	Department Admin Harvard International Office 1350 Massachusetts Ave SCC, Suite 864 Cambridge, MA United States 02138 6174962822	Ship date	06/11/2018
		Number of packages	1
		Total weight	1.00 lbs
		Declared/Carriage Value	0.0 USD
		Pricing option	FedEx Standard Rate
		Service type	Standard Overnight
		Package type	FedEx Envelope
		Dimensions	
		Bill transportation to	HIO-883
To	Scholar Name	Your reference	
	Scholar Address	Pickup/Drop-off	Drop off package at FedEx location
	Cambridge, MA	P.O. no.	
	United States	Invoice no.	
	02138	Department no.	
	6174950000	Special Services	

Edit **Ship**

14. Once on the screen with the FedEx airbill, click **Print**.

FedEx Ship Manager® My Profile Logout Help

Ship LTL Freight Ship History My Lists Reports Integration Manager Administration

Prepare a shipment

1 Enter shipping information 2 **Print label(s)**

Thank you for shipping with FedEx. Your tracking number: 772447042173

Label
 Receipt [View](#)

Print [Create return shipment](#) [Edit shipment](#) [Cancel shipment](#) [Repeat last](#) [Create new](#)
[Schedule a Pickup](#)

01 DUTA
7724 4704 2173
TUE -12 JUN 3:00P
STANDARD OVERNIGHT
MAJS BOS 02138

SCHOLAR ADDRESS
CAMBRIDGE MA 02138
SCHOLAR NAME

ORIGIN ID: DUTA (617) 496-2822
PREPARED BY: ADMIN
1350 MASSACHUSETTS AVE
CAMBRIDGE MA 02138
UNITED STATES US

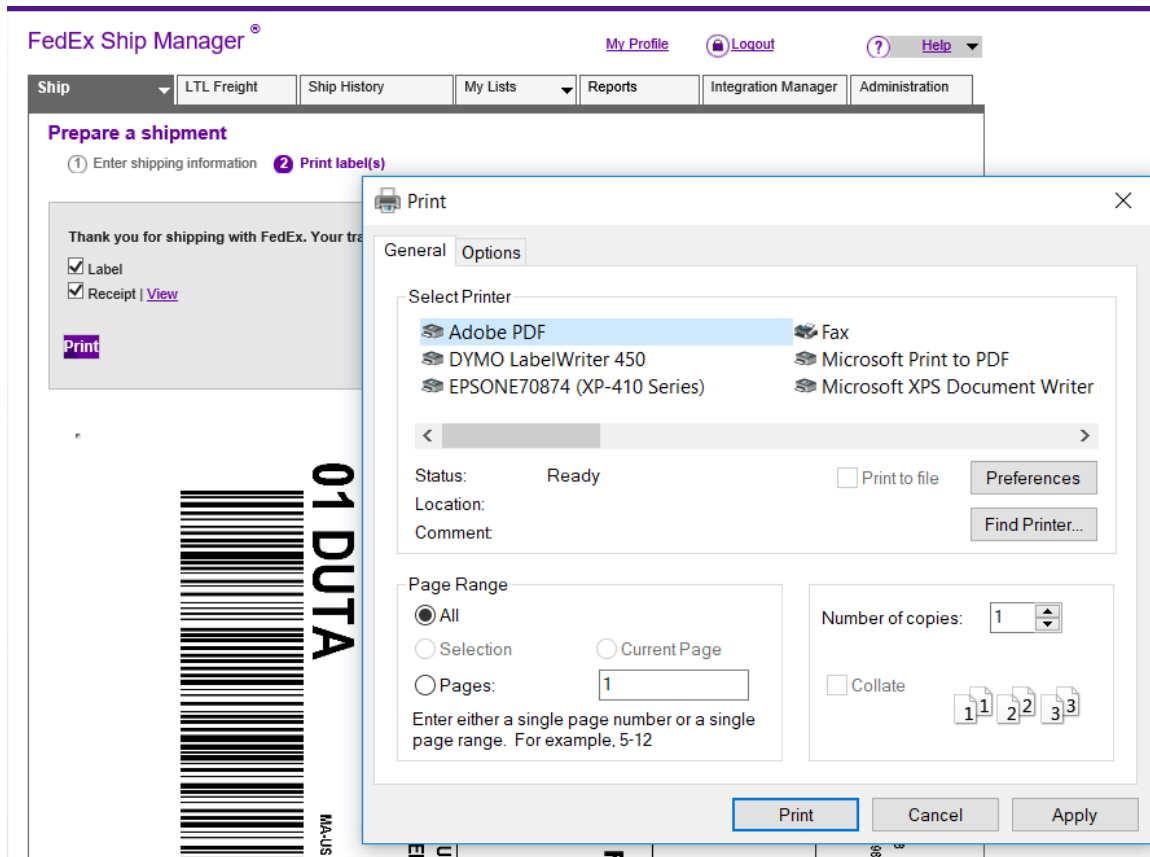
SHIP DATE: 06/11/18
CARRIER: 1
BILL TO: 1350 MASSACHUSETTS AVE
BILL TO: SCHOLAR

552.29CFDCC6

After printing this label:

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15. Select “Adobe PDF” as the Printer Name.
 - a. Click **Apply**.
 - b. Click **Print**.
 - c. Save this file to your desktop and then upload it to the **Documents** tab in ISD.



Please note: If you select FedEx for Mailing Instructions and do not attach an air bill to the record, the documents will be sent by Regular Air Mail Delivery. We suggest noting the FedEx tracking number and/or saving a PDF copy of the air bill so that you can track the package once it has been sent out and send updates to the scholar.

If you are having trouble with the FedEx web site, you can refer to their online help section by clicking the “Help” button in the FedEx Ship Manager, or by calling the FedEx Customer Service Department at 1.800.GoFedEx.