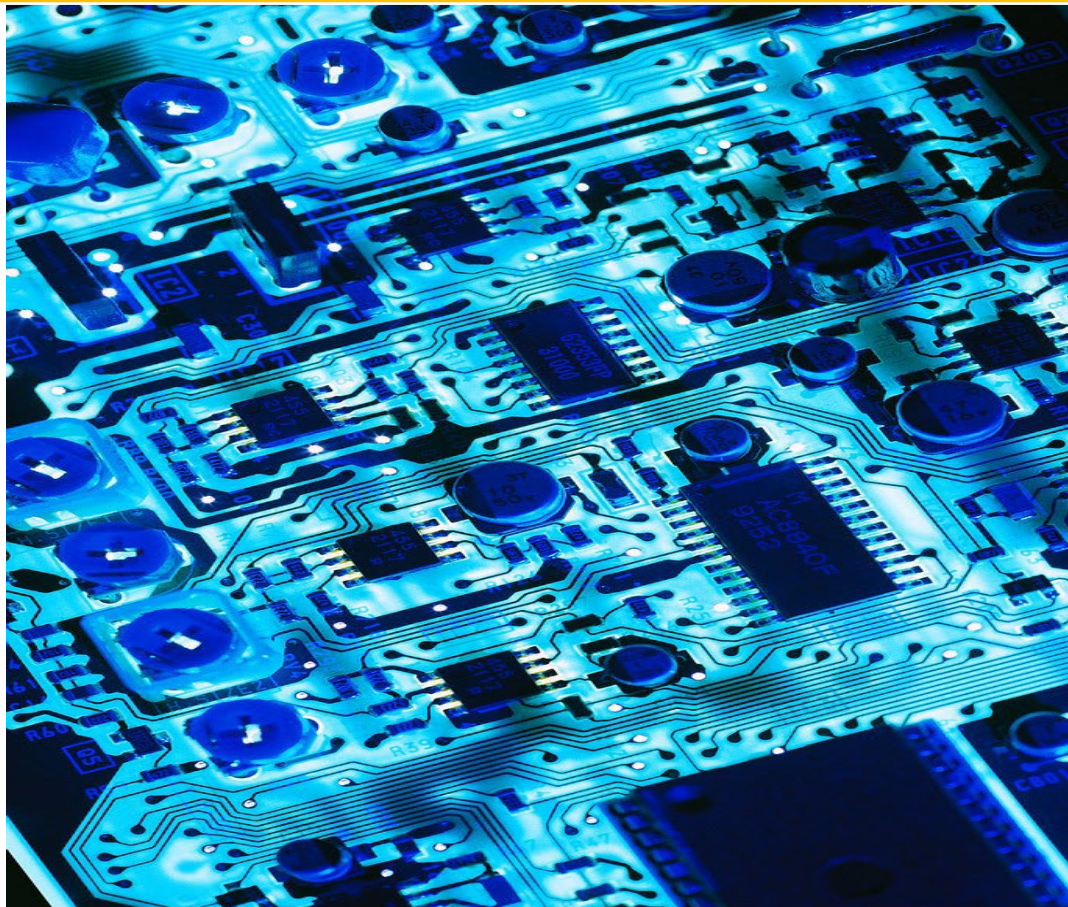


The University of California, Berkeley

## International Scholar Dossier (ISD) Department Guide



Berkeley International Office  
2150 Shattuck Avenue, Ste. 500  
Berkeley, CA 94704  
Tel: (510) 642-2818

J Scholar Email: [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu)

H-1B Email: [H1B@berkeley.edu](mailto:H1B@berkeley.edu)

<https://isd.berkeley.edu>

[internationaloffice.berkeley.edu](http://internationaloffice.berkeley.edu)

REVISED MARCH 2023

Q:\Scholars J\Training Material\ISD Department Training Materials 2023

**Berkeley**  
INTERNATIONAL OFFICE

# ISD Department Guide

## Table of Contents

Click on the links below to go directly to the page listed.

	Page
<a href="#">Introduction</a>	3
<a href="#">The ISD Process: An Overview</a>	4
<a href="#">Tips for Success</a>	5
<a href="#">Logging In and Updating Your Password</a>	6
<a href="#">The ISD Welcome Page and Host Department Agreement</a>	7
<a href="#">Searching for a Visitor's Record</a>	8
<a href="#">Adding a Visitor's Record</a>	9
<a href="#">Duplicate Records</a>	10
<a href="#">Inviting a Visitor</a>	11
<a href="#">Editing Visitor Permissions</a>	12
<a href="#">Editing and Updating Information in the Scholar Data Bar</a>	13-18
<a href="#">Biographical Tab &amp; Address Tab</a>	13
<a href="#">Appointment Tab</a>	13-14
<a href="#">General Subject / Field Code Summary Groupings</a>	15
<a href="#">Site of Activity</a>	16
<a href="#">Funding</a>	17
<a href="#">Position in Home Country</a>	18
<a href="#">Passport and Visa</a>	18
<a href="#">Attaching Documents</a>	19
<a href="#">Checklist of J-1 Scholar Documents</a>	20
<a href="#">H-1B Required Documents</a>	21
<a href="#">Bundling Documents &amp; Reducing PDF File Size</a>	22-24
<a href="#">Adding Notes</a>	25
<a href="#">Review and Submit Process</a>	26
<a href="#">Requesting an Extension</a>	27
<a href="#">After Submitting to Berkeley International Office</a>	28
<a href="#">History Tab</a>	28
<a href="#">Other Features: Email</a>	29
<a href="#">Resetting the Visitor's Password</a>	29

# ISD Department Guide

## Introduction

### What is International Scholar Dossier (ISD)?

ISD is a database system shared between Berkeley International Office, UC Berkeley departments and prospective international scholars. It is used to gather required information about the international scholar's program in order to create the visa documents. This database is used for J-1 scholars as well as H-1B and TN employees.

### The Request Process

After being invited by the UC Berkeley Department, ISD allows the international scholar to electronically submit preliminary information to the department administrator, or the department administrator can enter this information into the system. After the administrator reviews the data entered by the scholar, completes the departmental data, and uploads the payment and required attachments, s/he sends it electronically to the Berkeley International Office. Berkeley International Office 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 will be uploaded into the scholar's record prior to submission to Berkeley International Office. For H-1B cases, the checks to Department of Homeland Security must be delivered after submission of the ISD record with a memo noting the scholar's name and date of birth. All other documents, including the IOF payment, are submitted electronically through ISD.

### ISD Training and Login Information

You must attend an ISD training to be given access and login information. If you have not yet attended a meeting, please email [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu) or [H1b@berkeley.edu](mailto:H1b@berkeley.edu) for available training dates and instructions on how to register.

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

# ISD Department Guide

## 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 User Guide.*

### 1. Department Logs in to: <https://isd.berkeley.edu>

Your Username and password are provided in the email sent to you after attending the ISD training. 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:

- Click **Search for Visitor** from the Record Manager on the top left of ISD to see if the visitor is already in the database.
- If your search does not locate the visitor, 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). If there is a duplicate record, do NOT add the scholar; rather email [jscholar@berkeley.edu](mailto:jscholar@berkeley.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.
- Click **Tasks** from the ISD Action Bar and then click **Invite Visitor**. This will allow you to compose an email which will be sent to the scholar along with their login information. Copy yourself on this email so that you can help the scholar if s/he has trouble logging in. Click “Send”. If the 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:

- Uses the login information provided from email sent by Department (#2, above).
- Uploads all required attachments.
- Submits the information to Department.

### 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.”

- Review the scholar’s information for completeness and accuracy.
- Complete the departmental information on each tab, including the appointment, site of activity, and funding.

### 5. Department uploads required documents:

- Attach all required documents (including IOF payment) to the record (see “Checklist of J-1 Scholar Documents” for requirements).
- When requesting a J-1 expedite use the drop-down “Expedited J-1 IOF” so that the Berkeley International Office is alerted that the case is an expedite. Please also email [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu) to alert us as to the urgency of the request.

### 6. Add a note:

From the ISD Action Bar add a **Note** to inform Berkeley International Office of the type of request being submitted, for example “New J-1” or “H-1B extension”. **Always leave a separate note to indicate (J-1) Expedite requests.**

- Indicate if you would like to be contacted for pick-up when the case is ready, or if you have attached a FedEx airbill. If there is any other information you would like to communicate to BIO, please enter this in the **Notes**.

### 7. Submit to Berkeley International Office:

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

### 8. H-1B cases ONLY: Department brings Department of Homeland Security Checks

- Attach a memo indicating the name, date of birth, and host department of the scholar

### 9. Berkeley International Office processes request:

The Department will be notified when the document is ready for pick-up, or when it has been sent out. The normal processing time is 10 working days from the receipt of a complete ISD record for J-1 cases and 30 calendar days for H-1B cases.

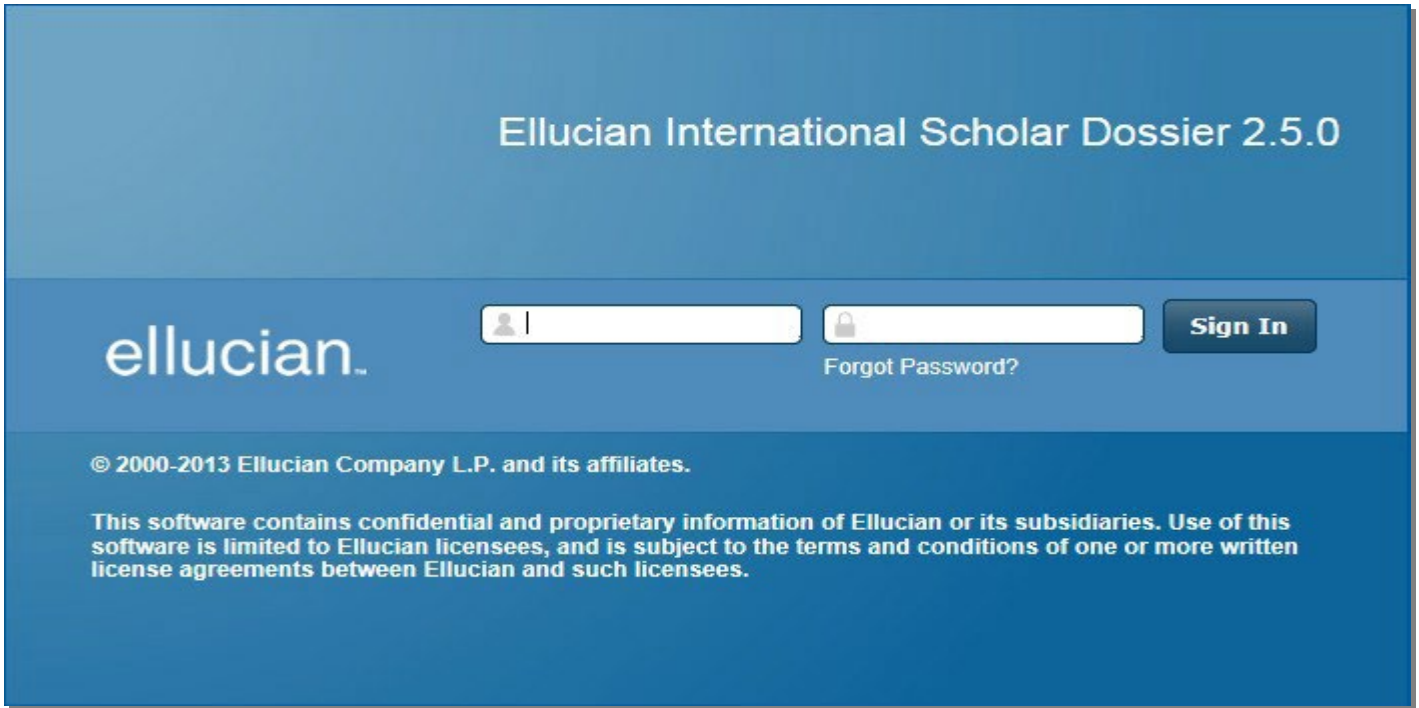
## Tips for success

[Return to Table of Contents](#)

- **Browser Compatibility.** ISD is compatible with Microsoft Internet Explorer version 7.0, 8.0, or 9.0 with latest service pack(s), and Mozilla Firefox version 18. 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. Entering a security question and answer will enable you to reset your password in case you forget it or get locked out of the system.
- **Duplicate Records.** When adding a new record to ISD, if a record appears as duplicated to the system, 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 may cause technical problems. Rather, please hit cancel, email [jscholar@berkeley.edu](mailto:jscholar@berkeley.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.
- **Save Each Section.** Click “Save” after completing each section. After 20 minutes of inactivity, ISD will automatically time out and will not save your information unless you have clicked **Save**.
- **Required Fields.** Fill in all required fields marked with a red asterisk (\*).
- **Emergency Information.** Emergency contact and phone number is a required field for all scholars (under the Permanent Address in the ISD Address tab).
- **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 visitor is having problems logging in, the most common reason is a password error. The easiest way to avoid this is for the scholar to copy and paste the automatically-generated password from his/her invitation email.
- **Error Messages.** If you receive an error when submitting a record to the Berkeley International Office, contact us at [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu) for J-1 cases, [H1B@berkeley.edu](mailto:H1B@berkeley.edu) for H-1B cases, or call 642-2818.

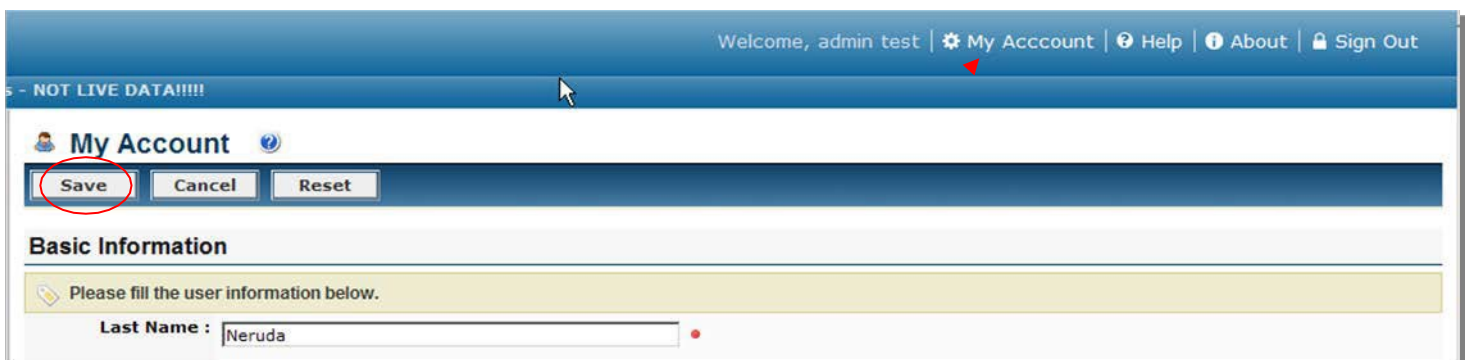
# ISD Department Guide

## Logging In and Updating Your Password



**Log in** to ISD with the user name and password provided in the email sent to you after attending the ISD training. The URL for ISD Department Login is: <https://isd.berkeley.edu>

**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 one.**



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  before proceeding to the next Tab.

# ISD Department Guide

## 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 ISD Department Guide, Checklist of required documents, and IOFs. The welcome page also includes the J-1 Host Department Agreement. The H-1B Statement of Responsibility is on a separate document.

## J-1 Host Department Agreement

It is important that departments understand their responsibilities when inviting an international scholar as listed in this section. By submitting a J-1 ISD record, the hosting UC Berkeley Department agrees to comply with their responsibilities.

### J-1 HOST DEPARTMENT AGREEMENT

By submitting each J-1 request to the Berkeley International Office, the host department certifies that all of the information provided in the ISD record is true and accurate and agrees to comply with the federal regulations listed below governing the J-1 Exchange Visitor Program. For H-1B cases upload the signed **Department Statement of Responsibility**.

**Providing Employees with Terms & Conditions of Employment Prior to Arrival:** At the pre-arrival stage, the host department will provide exchange visitors clear information and materials on terms and conditions of employment (including employer name and address, position duration, job duties, number of work hours, wages, other compensation and benefits, deductions from wages, including those taken for housing and transportation), insurance costs, and other conditions and restrictions of the exchange visit.

**Arrival Date:** The host department will notify Berkeley International Office no later than 9 days from the start date of the DS-2019. Use the Departmental **Scholar Status Report Form**

**Late Arrival:** The host department will notify Berkeley International Office of any arrival delays more than 9 days past start date on the DS-2019;

**Change of Address, Telephone Number and/or Email Address:** The host department will notify Berkeley International Office of all change of addresses for UC Berkeley J-1 Exchange Visitors and J-2 dependents within 10 days of the move. The host department will also notify Berkeley International Office of all changes in telephone numbers and email addresses for UC Berkeley J-1 Exchange Visitors and J-2 dependents;

**Financial Support Verification:** The host department has verified that the financial support listed is available to the scholar, and that these resources are adequate to complete his/her program and to support any accompanying dependents. (Scholars must have at least \$2,000 per month, plus \$600 per month for spouse, and \$400 per month per child);

**Health Insurance:** The host department will ensure that the scholar and his/her family maintain sufficient health insurance as defined by the University and U.S. federal guidelines for the entire duration of the scholar's visit;

**Scholar's Credentials:** The host department has determined that the international scholar's program is consistent with his/her professional background and experience;

**English Proficiency:** The host department has verified and documented that the international scholar has "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 [CFR 22 62.10(a)(2)];

**Changes in Program:** The host department will notify Berkeley International Office of any changes in the terms and conditions of this international scholar's exchange program, including employment or payment not listed on the scholar's DS-2019;

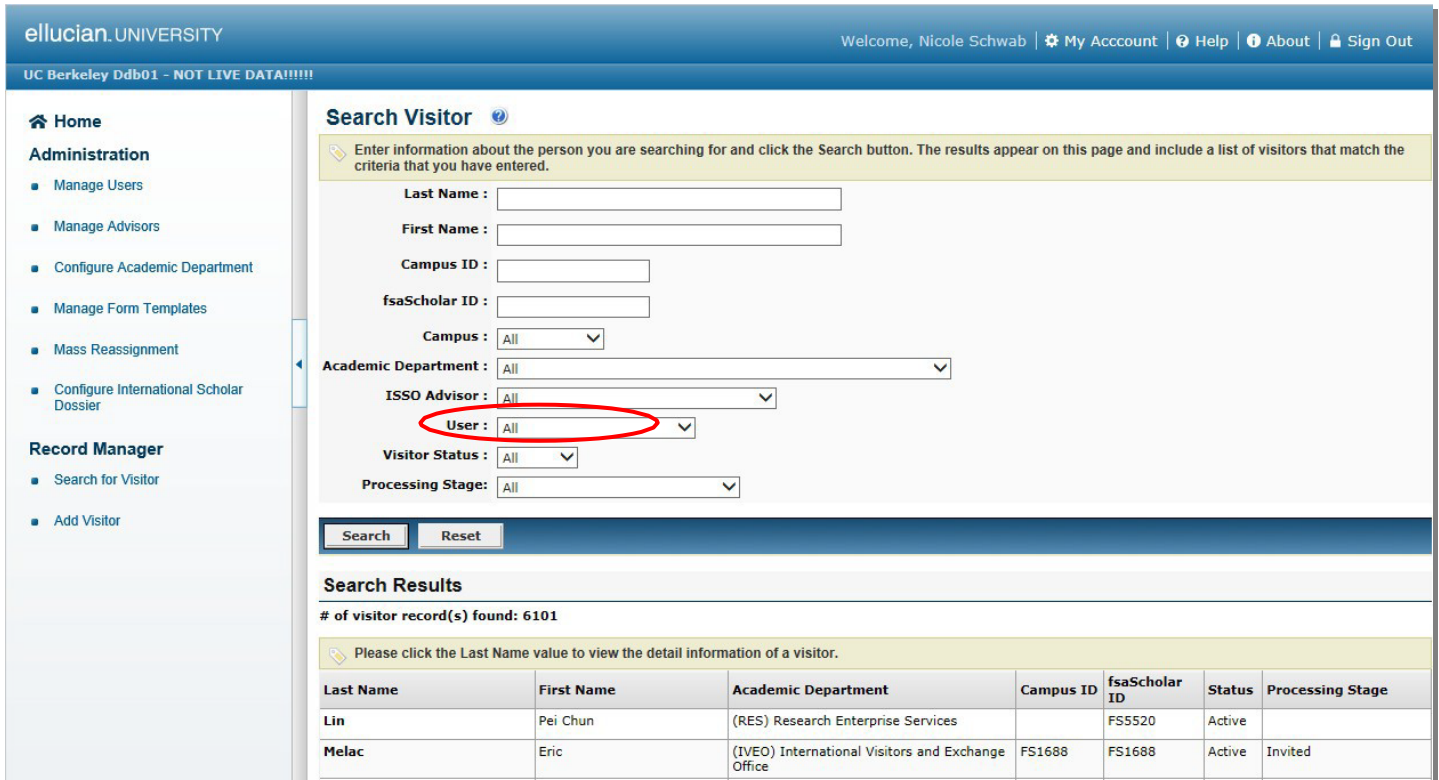
**Scholar Advising Support:** We will "monitor the physical location (site of activity), and the progress and welfare of exchange visitors to the extent appropriate for the category," including ensuring that he/she obtains sufficient advice and assistance to facilitate the successful completion of his/her exchange visitor program. [CFR22 62.10(d)(2)]

# ISD Department Guide

## Searching for a Visitor's Record

Log in to ISD and on the upper left side of the screen under Record Manager, select **Search for Visitor**. A list of all ISD records will appear. Search by Last Name and under Search Results, click on the scholar's last name.

The list of scholars can be sorted by name, department, or processing stage.



ellucian.UNIVERSITY

Welcome, Nicole Schwab | My Account | Help | About | Sign Out

UC Berkeley Ddb01 - NOT LIVE DATA!!!!!!

**Search Visitor**

Enter information about the person you are searching for and click the Search button. The results appear on this page and include a list of visitors that match the criteria that you have entered.

Last Name :

First Name :

Campus ID :

fsaScholar ID :

Campus : All

Academic Department : All

ISSO Advisor : All

User : All

Visitor Status : All

Processing Stage : All

Search Reset

**Search Results**

# of visitor record(s) found: 6101

Please click the Last Name value to view the detail information of a visitor.

Last Name	First Name	Academic Department	Campus ID	fsaScholar ID	Status	Processing Stage
Lin	Pei Chun	(RES) Research Enterprise Services		FS5520	Active	
Melac	Eric	(IVEO) International Visitors and Exchange Office	FS1688	FS1688	Active	Invited

If you can't find the scholar try to repeat the search but leave the "User" field with the value "All" instead of your name.



# ISD Department Guide

## Adding a Visitor's Record

If the scholar did not show up in your search ([see p.8](#)), click **Add Visitor** on the upper left side of the screen under Record Manager.

ellucian. UNIVERSITY | Welcome, Nicole Schwab | My Account | Help | About | Sign Out

UC Berkeley Ddb01 - NOT LIVE DATA!!!!!!

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**

### Add Visitor

Save Cancel Reset

#### Basic Information

Please fill the basic visitor information below.

Last Name :

First Name :

Middle Name :

Campus ID :

Campus :

Academic Department :

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 :

#### 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)

Save Cancel Reset

- Input incoming scholar's information. The scholar's name should be entered as it appears in the barcode of the passport. Fields marked with a red dot are required.
- Campus ID field should be left blank. Campus should be "UC Berkeley."
- Department's name should be selected from the Academic Department pull-down menu.
- 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.
- **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 can send containing a password that will allow the incoming scholar to access ISD. **Do not use your own email address in this field.**
- Select **Read/Write** for the Scholar's Permission to allow the scholar to edit personal information in ISD. If you prefer to enter all of the scholar's information, set the permission to **None**, or **View**.

Click  before proceeding to the next Tab.


# ISD Department Guide

## Duplicate Records

ISD will now check if there is a record in the Berkeley International Office database with the same name that you have entered. A record may exist if the scholar is currently at UC Berkeley (extension cases or change of department), or if the scholar has been at UC Berkeley in the past.

In such cases, click **Cancel**. DO NOT SELECT THE RECORD. This would require unnecessary work on your part and could create data discrepancies.

**Duplicates Record Found**

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

Attention	Last Name	First Name	Campus ID	Academic Department	Status
False	Bear	Papa	FS274	Academic Personnel	Inactive
False	Bear	Papa	FS274	Bioengineering	Active

Next, send an email to [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu) or [H1B@berkeley.edu](mailto:H1B@berkeley.edu) to report the duplicate record and receive instructions on how to proceed. See below for more details.

### What to do:

1. When you come to the Duplicate Records Found screen, click Cancel, and exit the record.
2. Email [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu) or [H1B@berkeley.edu](mailto:H1B@berkeley.edu) with the subject header "ISD duplicate record for \_\_\_\_ (name of scholar)". In the text of the email include:
  - a) Passport name of scholar
  - b) Date of birth of the scholar
  - c) Current email address for the scholar
  - d) Name of the department/unit requesting the ISD record
  - e) Type of request: Indicate if the case will be J-1 or H-1B
  - f) Dates of appointment
3. Berkeley International Office will reply to your email with instructions on how to proceed.

# ISD Department Guide

## Inviting a Visitor

ellucian.UNIVERSITY  
UC Berkeley Ddb01 - NOT LIVE DATA!!!!!!

Home  
Administration  
Manage Users  
Manage Advisors  
Configure Academic Department  
Manage Form Templates  
Mass Reassignment  
Configure International Scholar Dossier  
Record Manager

Visitor : Papa Bear  
Campus ID : FS274  
fsaScholar ID : FS274  
Academic Department : Bioengineering  
Visitor Status : Active  
Processing Stage : Invited

Tasks Notes Documents Forms History  
Biographical Address Appointment

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

After you have added the record you will need to click on the **Tasks** tab in the ISD Action Bar and click **Invite Visitor**.

The invitation process will generate an email with the scholar's email address prefilled. We suggest putting 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. Enter the text for the email body, and click **Send**.

Invite Visitor

Please enter your email information below.

To : jscholar@berkeley.edu  
Cc :  
Bcc :  
Subject : You have been invited to Bioengineering department  
Body :  
Welcome to the Department of XXXXX. UC Berkeley will need the following information from you in order to process the necessary visa document for your upcoming visit to UC Berkeley. Please use only Microsoft Internet Explorer 7.0, 8.0, or 9.0 with latest service pack(s), or Mozilla Firefox 18 to enter your information into International Scholar Dossier (ISD) and contact me, your department administrator, when you have completed and submitted your information to the Department. Please do not schedule a visa interview appointment at a U.S. Embassy or Consulate until you have obtained the necessary visa documents from the Berkeley International Office.

Send

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

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

Please note that the ISD URL for the visitor is different from the one used by you.

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

----- Original Message -----

**Subject:**You have been invited to Bioengineering department  
**Date:**18 Sep 2014 13:45:24 -0700  
**From:**[nicole\\_schwab@berkeley.edu](mailto:nicole_schwab@berkeley.edu)  
**To:**[jscholar@berkeley.edu](mailto:jscholar@berkeley.edu)

Welcome to the Department of XXXXX. UC Berkeley will need the following information from you in order to process the necessary visa document for your upcoming visit to UC Berkeley. Please use only Microsoft Internet Explorer 7.0, 8.0, or 9.0 with latest service pack(s), or Mozilla Firefox 18 to enter your information into International Scholar Dossier (ISD) and contact me, your department administrator, when you have completed and submitted your information to the Department. Please do not schedule a visa interview appointment at a U.S. Embassy or Consulate until you have obtained the necessary visa documents from the Berkeley International Office.

Please use the below username and password information to login into the url specified

URL = <https://visddev.berkeley.edu:6443/Login.aspx>

UserName = Papa Bear

Password = WdJTAJsg!U2Lqz

# ISD Department Guide

## Editing Visitor Permissions

After the visitor has entered 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 visitor 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**

**Edit Visitor** ⓘ

### Basic Information

Please fill the basic visitor information below.

**Last Name :**  •

**First Name :**

**Middle Name :**

**Campus ID :** FS274

**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)

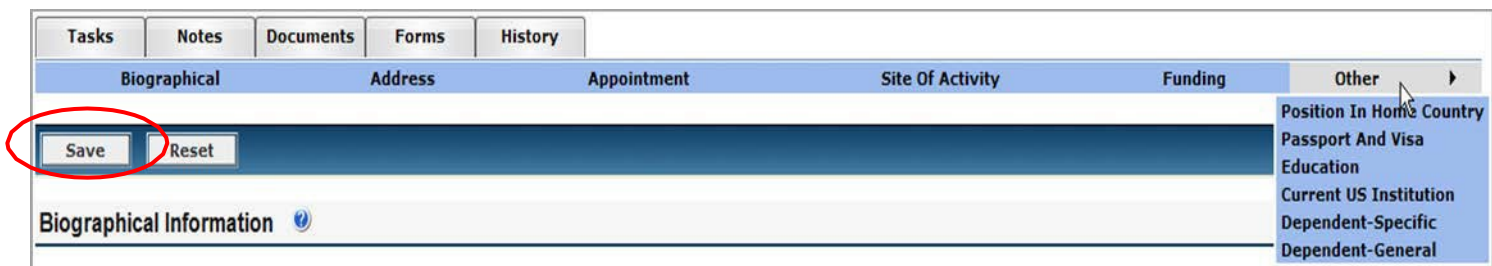
Click  before proceeding to the next Tab.

# ISD Department Guide

## 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. Additional information that the scholar does not have access to must be entered by the department. This includes the Appointment, Site of Activity, and Funding tabs.



Click  before proceeding to the next Tab.

## Instructions for Tabs

### Biographical Tab:

In most cases, the biographical information will be entered by the visitor. Review and edit as necessary.

### Address Tab:

There are three Address Types. Remember to click "Save" after entering each address.

- 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.
- Permanent (required for all cases):
  - Enter the scholar's home country address.
  - Enter the emergency contact person name and emergency contact person phone number.
- 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.

### Appointment Tab:

- In the **Appointment Start Date**, **Appointment End Date**, and **Appointment Title** fields, enter information based on the UC Berkeley appointment approval (to be uploaded into documents tab).
- For J-1 scholars select either "Research Scholar" or "Short-Term Scholar" as the **J visitor category**. For H-1B cases select "N/A." Click [here](#) for category information.

# ISD Department Guide

## Editing and Updating Information in the Scholar Data Bar (cont'd)

### Appointment Tab, (cont'd):

- The **Subject Field Code** should reflect the area of research or teaching in which the scholar will engage while at UC Berkeley. For J-1 extension cases and transfer cases, the code should be used from the scholar's current DS-2019. For new cases, Department Administrators should work with the faculty sponsor who is inviting the visitor to select a subject/field code from the drop-down menu that accurately reflects the area of research and/or teaching. The complete listing of the CIP codes, can be found at the following website:

<http://nces.ed.gov/ipeds/cipcode/default.aspx?v=55>

**The scholar code must begin with a number (student codes are alphabetized at the bottom of the list and will result in an error).**

Because US Department of Homeland Security regulations require that all research/teaching activities must be consistent with and closely related to the subject/field indicated on the Form DS-2019, selecting a broad subject/code may allow for the exploratory and/or interdisciplinary nature of some research projects while still defining the original program objective.

Please see the following page for a list of [General Subject / Field Code Summary Groupings](#).

- In the **Field of Research or Teaching**, enter a brief description of what the scholar will be researching or teaching while at UC Berkeley.
- Enter if the primary activity is Research, or Teaching. If the visitor will be engaging in both, indicate the primary activity.

Appointment Fields Data	
For a complete list of subject field codes, <a href="#">click here</a> . For more information on Research Scholar vs. Short Term Scholar Categories, <a href="#">click here</a> .	
Location of Appointment	UC Berkeley
UC College/School Name	College of Engineering
Department Name	Bioengineering
Appointment Start Date	1 February 2015
Appointment End Date	31 May 2015
Appointment Title	N3265 -Visiting Student Researcher
If Other Appointment Title	
Department Chairperson	Chair Bear
Faculty Sponsor or P.I.	Professor Bear
Is appointment 6 months or less?	Yes
If Yes, is there a possibility appointment will be extended beyond 6 months?	No
Short-term Scholar (6 months or less), Research Scholar (J-1 up to 5 years), n/a for non-J cases	Short-Term Scholar
<b>Subject field code</b>	14.0501
	14.0501 Bioengineering and Biomedical Engineering. - 14.0501
Field of Research or Teaching at UC Berkeley	Research in Engineering
Primary UC Berkeley Activity (Research or Teaching)	Research
Is the position tenure track?	No
H-1B ONLY Full-Time UC Salary (annual salary to nearest dollar)	
Custom Fields Data	
Custom Appointment Information	
RES,ERSO,IVEO,Miller, Acad Dept	
Save	Reset

Code	Description
01	AGRICULTURE, AGRICULTURE OPERATIONS, AND RELATED SCIENCES
03	NATURAL RESOURCES AND CONSERVATION
04	ARCHITECTURE AND RELATED SERVICES
05	AREA, ETHNIC, CULTURAL, AND GENDER STUDIES
09	COMMUNICATION, JOURNALISM, AND RELATED PROGRAMS
10	COMMUNICATIONS TECHNOLOGIES/TECHNICIANS AND SUPPORT SERVICES
11	COMPUTER AND INFORMATION SCIENCES AND SUPPORT SERVICES
12	PERSONAL AND CULINARY SERVICES
13	EDUCATION
14	ENGINEERING
15	ENGINEERING TECHNOLOGIES/TECHNICIANS
16	FOREIGN LANGUAGES, LITERATURES, AND LINGUISTICS
19	FAMILY AND CONSUMER SCIENCES/HUMAN SCIENCES
21	TECHNOLOGY EDUCATION/INDUSTRIAL ARTS
22	LEGAL PROFESSIONS AND STUDIES
23	ENGLISH LANGUAGE AND LITERATURE/LETTERS.
24	LIBERAL ARTS AND SCIENCES, GENERAL STUDIES, AND HUMANITIES
25	LIBRARY SCIENCE
26	BIOLOGICAL AND BIOMEDICAL SCIENCES
27	MATHEMATICS AND STATISTICS
28	RESERVE OFFICER TRAINING CORPS (JROTC, ROTC)
29	MILITARY TECHNOLOGIES
30	MULTI/INTERDISCIPLINARY STUDIES
31	PARKS, RECREATION, LEISURE AND FITNESS STUDIES
32	BASIC SKILLS
33	CITIZENSHIP ACTIVITIES
34	HEALTH-RELATED KNOWLEDGE AND SKILLS
35	INTERPERSONAL AND SOCIAL SKILLS
36	LEISURE AND RECREATIONAL ACTIVITIES
37	PERSONAL AWARENESS AND SELF-IMPROVEMENT
38	PHILOSOPHY AND RELIGIOUS STUDIES
39	THEOLOGY AND RELIGIOUS VOCATIONS
40	PHYSICAL SCIENCES
41	SCIENCE TECHNOLOGIES/TECHNICIANS
42	PSYCHOLOGY
43	SECURITY AND PROTECTIVE SERVICES
44	PUBLIC ADMINISTRATION AND SOCIAL SERVICE PROFESSIONS
45	SOCIAL SCIENCES
46	CONSTRUCTION TRADES
47	MECHANIC AND REPAIR TECHNOLOGIES/TECHNICIANS
48	PRECISION PRODUCTION
49	TRANSPORTATION AND MATERIALS MOVING
50	VISUAL AND PERFORMING ARTS
51	HEALTH PROFESSIONS AND RELATED CLINICAL SCIENCES
52	BUSINESS, MANAGEMENT, MARKETING, AND RELATED SUPPORT SERVICES
53	HIGH SCHOOL/SECONDARY DIPLOMAS AND CERTIFICATES
54	HISTORY (NEW)
55	LANGUE et LITTERATURES FRANCAISES/LETTRES (NEW)
60	RESIDENCY PROGRAMS

# ISD Department Guide

## Editing and Updating Information in the Scholar Data Bar (cont'd)

Site of Activity: Click "Add new"

Tasks	Notes	Documents	Forms	History	
Biographical	Address	Appointment	Site Of Activity	Funding	Other
Site Of Activity					
<b>Add New</b>					
This tab lists the visitor's site of activity information.					
Site of Activity Name	Site Address	Primary Site			
No Site of Activity Found					

- Select "Yes" for the scholar's primary site of activity.
- In Site of Activity Name, enter "UC Berkeley Campus" (if activity will take place on campus).
- In Work Site, enter the address where the research/teaching will take place. Include the room number and building if a campus address is used.
- In Site Address Line 2, enter the name of the hosting department or research unit.
- 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 periods of two weeks or longer. Notify Berkeley International Office of any changes in job site.

**Save** **Reset**

### Site Of Activity Information

Site Of Activity Fields Data

Select "Yes" for the scholar's primary site of activity.  
In Site of Activity Name, enter "UC Berkeley Campus" (except affiliates).  
In Work Site (i.e. 150 University Hall), enter the address where the research/teaching will take place.  
Subsequent fields, enter the name of the hosting department or research unit.

Primary Site	Yes
Site of Activity Name (UC Berkeley Campus)	UC Berkeley Campus
Work Site (i.e. 150 University Hall)	314 Moses Hall
Site Address Line 2 (Dept. of XXXX)	Dept. of Philosophy
City	Berkeley
State	California(CA)
Zip Code	94720

Click  before proceeding to the next Tab.

[Return to Table of Contents](#)



# ISD Department Guide

## Editing and Updating Information in the Scholar Data Bar (cont'd)

### Funding (For J-1 Cases only):

- See [J Scholar Financial Requirements](#) for current minimum living expense requirement
- All funding must be guaranteed, and documentation must be uploaded.
- All funding must be translated into English, converted to U.S. dollars, and dated within the last six (6) months.
- All dollar amounts must be entered without commas or periods, and should be rounded to the nearest whole dollar (for example, \$15,459.87 should be entered as 15460).
- The funding listed must cover the start date through end date of the Form DS-2019.
- Once appointment dates are entered and any dependents are added, check in the History tab to see a customized calculated minimum funding amount for the scholar's program.

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

Heading	Field name	Instructions	Additional documents to be uploaded:
<b>Program Sponsor Funds</b>	Program Sponsor Funds (UC Berkeley issues check)	Enter total amount of funds the scholar will receive from a UC Berkeley source.	The appointment letter/memo signed by a dean with appointment dates, salary, percentage, and title must be uploaded.
	Type of funding (UC Salary, Grant, Honorarium, per diem, or Endowment)	State whether the funding is a salary, grant funds, an honorarium, per diem, or Endowment Funds.	
<b>Government Funds</b>	Home Government Funds (in US\$)	Enter total amount of funds the scholar will receive from their home government.	Official award letter/document on letterhead with amount in US dollars, dates, and any other parameters of the agreement. If amount is given in a foreign currency, include a conversion.
	Name of Government Organization		
<b>Other Organization Funds</b>	Other Organization Funds (in US\$)	Enter amount of funding supplied by an outside source such as the scholar's employer or a third party organization.	Official award letter/document on letterhead with amount in US dollars, dates, and any other parameters of the agreement. See <a href="#">Employer Funding Letter</a> template. Please note: we do <u>not</u> accept paystubs as the sole proof of funding.
	Name of Organization		
<b>Personal Funds</b>	Personal Funds (in US\$)	Enter total amount of funds from the scholar or private individual's personal funds.	Upload bank statement as well as the <a href="#">Guarantee of Financial Support form</a> if funding is from a source other than the scholar.
	Sponsor's relationship to visitor (i.e. parent, spouse, etc.)		

## Editing and Updating Information in the Scholar Data Bar (cont'd)

### Position in Home Country:

- If the scholar has not already done so, please indicate the scholar's position in the **country of Legal Permanent Residence**, as well as the employer/institution name.
- If the scholar is a student, please indicate either "Undergraduate Student" or "Graduate Student" and the name of the educational institution.

### Passport and Visa:

The visitor may have completed the fields. Before submitting to Berkeley International Office, the department should complete/verify the following fields:

- **The Passport Number is required for H-1B cases**
- The **Visa** section is only required if the scholar has a valid visa stamp in their passport.
- The **I-94** section is only required for scholars currently in the U.S.
- **Is the scholar requesting a change of status:** If the visitor is requesting to change status from another visa classification to J-1 or H-1B, consultation with a Scholar Advisor at the Berkeley International Office is required to discuss the process at least six months prior to the begin date. If the scholar has already met with a Berkeley International Office advisor, indicate the name of the advisor in the notes tab.
- **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, email [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu) or [h1B@berkeley.edu](mailto:h1B@berkeley.edu).
- **Is the scholar currently subject to the J-1 2-year (212e) home country residency requirement?** If the scholar has never been in the U.S. in J status, has never been subject to the 2-year (212e) residency requirement, or has received a waiver of the requirement indicate "No".
- **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 never been in the U.S. in J status, has never been subject to the 2-year (212e) residency requirement, or has never received a waiver recommendation enter "no". If the scholar has applied for a waiver of the 2-year home country residency requirement and has received a waiver recommendation from the U.S. Department of State, enter "yes".
- **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 Berkeley International Office to discuss the case.

# ISD Department Guide

## Attaching Documents

Before submitting an ISD record to Berkeley International Office, all required documents must be uploaded.

The Checklist of J-1 Scholar Documents is on [page 20](#).

H-1B required documents are on [page 21](#).

Please upload all documents as one bundle. Instructions provided on [pages 22-24](#).

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. Scroll down to select the type of document.
5. Click **Save**.

The screenshot shows the 'Document Attachments' form in the ISD system. The 'Documents' tab is active in the top navigation bar. The form fields are: 'Document Path' with a 'Browse...' button; 'Is Active?' with a checked checkbox; 'Document Name' with the text 'New Initial J-1 Bundle'; 'Document Type' with a dropdown menu showing '01. J-1 New Initial Bundled Docs' and an 'Add Document Type' button; and a 'Save' button. A red vertical line is drawn through the form, and red circles highlight the 'Document Type' dropdown and the 'Save' button.

**Documents that can be attached 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)

# Checklist of J-1 Scholar Documents

## **For All Requests** Include photocopies of the following:

- Identity/biographical page of passport showing name, date of birth, and barcode
- Identity/biographical page of dependents' passports showing name, date of birth, and barcode (if applicable)
- English Language Proficiency Documentation (select one)  
See [BIO website](#) for detailed information (not required for extension cases)
  - Copy of a recognized English language test (TOEFL or IELTS)
  - Signed documentation from an academic institution or English language school, [see template](#)
  - Signed documentation of an interview conducted by the faculty sponsor or UC Berkeley host department designee, [see template](#)
- Curriculum Vitae/Resume (not required if already uploaded in ISD for prior case)
- Proof of legal permanent residence  
If different from citizenship, must be translated into English. See LPR resource for more information.
- Proof of funding [see guidelines](#)
  - Converted to US dollars, in English, dated within last 6 months for each source listed.
  - If paid by UC Berkeley, include copy of appointment letter or VSPA stipend email approval, if applicable
- All Previous DS-2019s (of scholar and dependents)  
If scholar has been in J status before, upload all previous DS-2019 copies
- Appropriate Campus Approval
  - Appointment letter signed by the Dean
  - VSPA approval
- [J-1 Host Faculty Agreement](#)
- J-1 Services Fee Payment (select one; dated within past 2 months)
  - [\\$650 Initial IOF](#) (signed) for New, Transfer or Change of Status Requests only
  - [\\$400 Extension IOF](#) (signed) for extension requests only J-1
- Expedite fee (if applicable)
  - [\\$300 IOF](#) (signed) for Expedite Requests only. Add reason for expedite in Notes tab.
- Add a note in ISD  
Include the type of request, confirmed scholar email address for DocuSign transmission and HR Partner/Generalist contact info, if applicable, in the Notes tab.
- Submit to Berkeley International Office  
After all information and documents are uploaded

## **Extension of Program Request**

If the scholar is already in J-1 status at UC Berkeley, include photocopies of the following:

- Required items for all requests** (see left column) Please note English Language Proficiency not required for extensions
- [Electronic I-94 record](#) or copy of the paper I-94 (front & back) for scholar and dependents
- Visa stamps for scholar and dependents
- All current and previous DS-2019 documents for scholar and dependents
- [Health Insurance Agreement](#) signed by scholar
- ❖ Enter Local U.S. Address, Phone & Email (Spouse's email if applicable)
- ❖ Complete and update all fields in "Passport and Visa" tab

## **Change of Status Request**

For scholars in the U.S. who will change status to J-1, a consultation with a Berkeley International Office Scholar Advisor is required at least six months prior to their start date.

If the scholar has already met with a Berkeley International Office Advisor, indicate the name of Advisor in a note. Include photocopies of the following:

- Required items for all requests** (see left column)
- [Electronic I-94 record](#) or copy of the paper I-94 (front & back) for scholar and dependents
- Visa stamps for scholar and dependents
- All current and previous I-20s for F-1 and dependents, if applicable
- Employment Authorization Document (EAD), if applicable
- ❖ Enter Local U.S. Address, Phone & Email (Spouse's email if applicable)
- ❖ Complete and update all fields in "Passport and Visa" tab

## **Transfer of Program Request**

If the scholar is in J-1 status at another U.S. institution and is transferring to UC Berkeley, include copies of the following:

- Required items for all requests** (see left column)
- [Electronic I-94 record](#) or copy of the paper I-94 (front & back) for scholar and dependents
- Visa stamps for scholar and dependents
- All current and previous DS-2019 documents for scholar and dependents
- [Health Insurance Agreement](#) signed by scholar
- ❖ Enter Local U.S. Address, Phone & Email (Spouse's email if applicable)
- ❖ Complete "Current U.S. Institution" tab with International Adviser contact information
- ❖ Complete all fields in "Passport and Visa" tab

# ISD Department Guide

## H-1B Petition Checklist

Scholar's Surname, Given Name (as in passport)

Please use this checklist as a guide for submitting an ISD record. Color photocopies are preferred, including passport date stamps and photos. Use blue ink for all signatures.

### A. EMPLOYING DEPARTMENT

**Submit the following original checks to Berkeley International Office with an H-1B petition checks memo**

- Filing fees on separate UCB checks payable to:  
*Department of Homeland Security  
P.O. Box 10129, Attn: I-129 Unit  
Laguna Niguel CA 92607  
(Vendor Number: 0000058729)*
  - \$460: H-1B Petition
  - \$500: Fraud Prevention and Detection (not required for UCB H-1B extensions)
  - \$2500: USCIS Premium Processing fee (optional)
  - \$370 & \$85: Dependents in the U.S. changing to extending H-4 status (personal check or money order accepted)

### B. EMPLOYING DEPARTMENT

**Scan and upload the following documents into ISD**

- \$2200 or \$2500 H-1B Services fee signed BIO IOF
- H-1B Statement of Responsibility
- Actual Wage Information Form (follow BIO instructions). Part-time attestation must be signed for part-time employment
- Departmental Announcement/Intent to File Labor Condition Application (except for union represented positions)
- Copy of appointment approval
- Copy of applicable UC Salary Scale
- Export Control Certification
- Employment Verification Letter on UC letterhead, dated within the last 30 days (follow BIO instructions).
- For tenure teaching positions, a copy of the advertisements
- For tenure teaching positions, a copy of the job offer letter signed by the Vice Provost for Academic Affairs and Faculty Welfare
- For tenure positions (optional) the signed Permanent Residency Initial Information form (if the Department is also initiating the Permanent Residence Process)

### C. EMPLOYEE INFORMATION

**Scan and upload the following into ISD:**

- H-1B Employee Information Form
- Passport biographical page(s) with expiration date shown
- Curriculum Vitae with list of publications and current employment
- Copy of Diploma or highest degree earned. If not in English (including Latin) provide a certified English translation (see BIO sample)
- Transcripts (optional) if degree does not note degree field
- Academic Equivalency Evaluation (optional) if not a U.S. degree
- If currently in the United States
  - Copy of both sides of current I-94 card or electronic I-94
  - Copies of passport entry stamps and all U.S. visa stamps
- For Extension, Change of Employer, Amendment petitions:
  - Copies of employee's three most recent pay stubs from current employer
- H-1B, TN or E-3 workers (currently or in the past)
  - Copies of all I-797 approval notices
- F-1 and OPT students- copies of all I-20 forms, EAD cards
- J-1 Status (if current or at any time in past):
  - Copies of all DS-2019 forms and J visa stamps
  - Copy of I-612 waiver from USCIS (if subject to the J-1 Two-Year Home Physical Presence requirement)
  - Copy of waiver recommendation letter from the Dept. of State. (if subject to the J-1 Two-Year requirement)
  - If you are not sure if the scholar is subject to the J-1 Two-Year requirement, contact an Adviser at Berkeley International Office.
- Employees who have filed an immigrant visa petition:
  - Copies of receipt and/or approval notices of Forms I-140, I-485, EAD card, and advance parole document

### DEPENDENTS CURRENTLY IN THE U. S.

**Scan and upload the following in ISD:**

- Passport biographical page(s) with expiration date shown
- Copy of both sides of current I-94 card (in passport) or electronic I-94
- Copy of most recent visa stamp and entry stamp in passport
- Copy of Immigration Documents, as applicable:
  - F-2: copies of all I-20 forms
  - J-2: copies of all DS-2019 forms and visa stamps
  - H-4, TD or E-3: copies of all I-797 approvals
  - Employment Authorization Documents (EAD), if applicable
- Copies of registered marriage certificate and/or birth certificate confirming dependent's relationship to the H-1B employee. If not in English, provide a certified English translation (see BIO sample)

**Submit the original with signature in blue ink**

- Original of Form I-539, typed and signed in blue ink by the principal H-4 dependent (follow BIO instructions). The original signed I-539 should be brought to Berkeley International Office along with the checks and a payment memo.

# ISD Department Guide

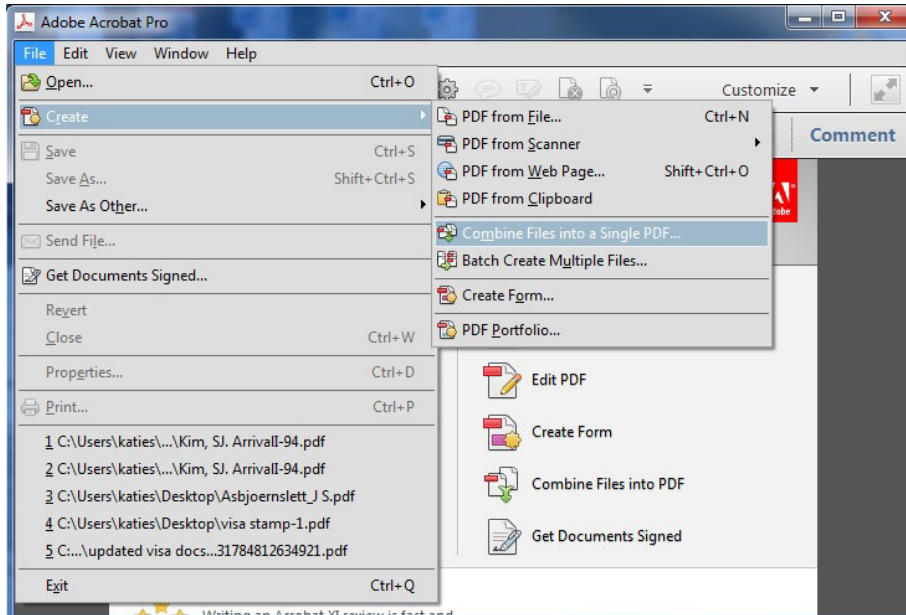
## Bundle Documents into a Single PDF & Reduce the PDF Size

(Adobe Acrobat is available to all campus departments at <http://s.berkeley.edu>)

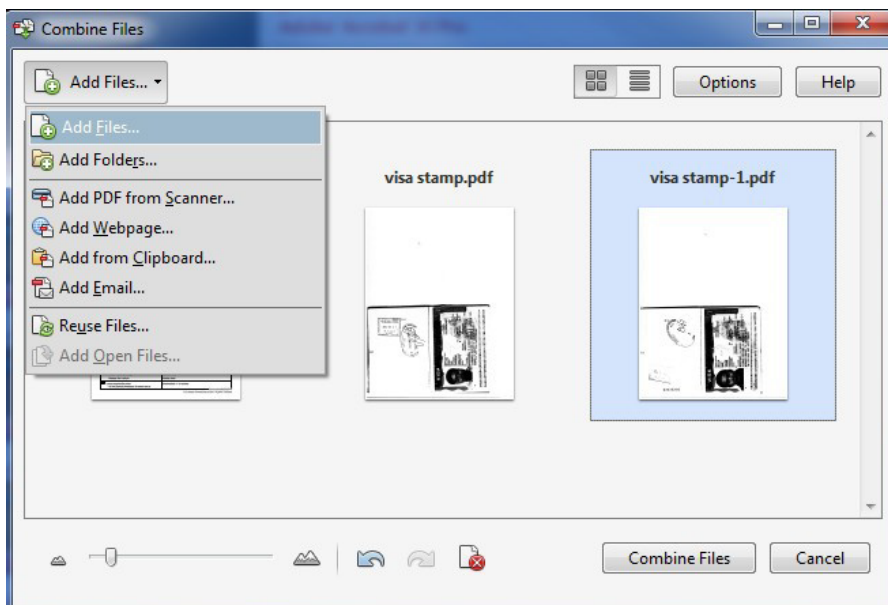
All files to be bundles must be saved on your computer

### How to Bundle Documents into a Single PDF

1. Open Adobe Acrobat
2. Select **File**>> **Create** >> **Combine Files into a Single PDF**



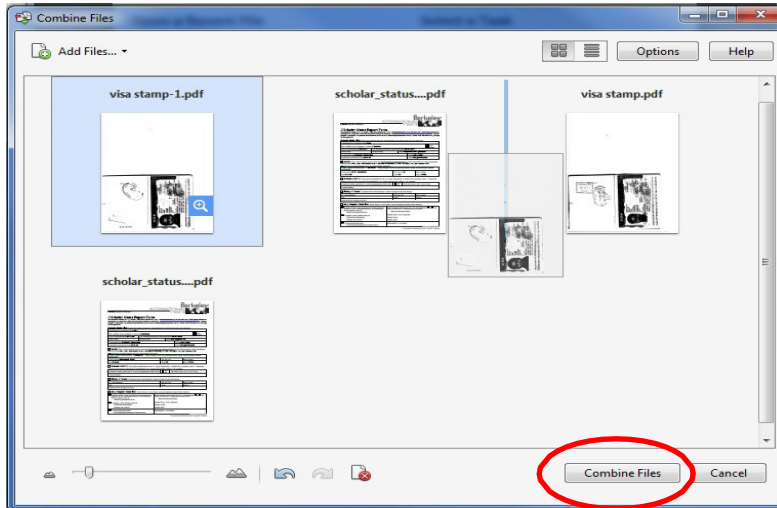
3. You can drag and drop files into the dialogue box, or go to **Add Files**>> **Add Files** and select the files to be bundled



# ISD Department Guide

## Bundle Documents into a Single PDF & Reduce the PDF Size (cont'd)

4. You can adjust the order of the documents by dragging and dropping them into the order you want

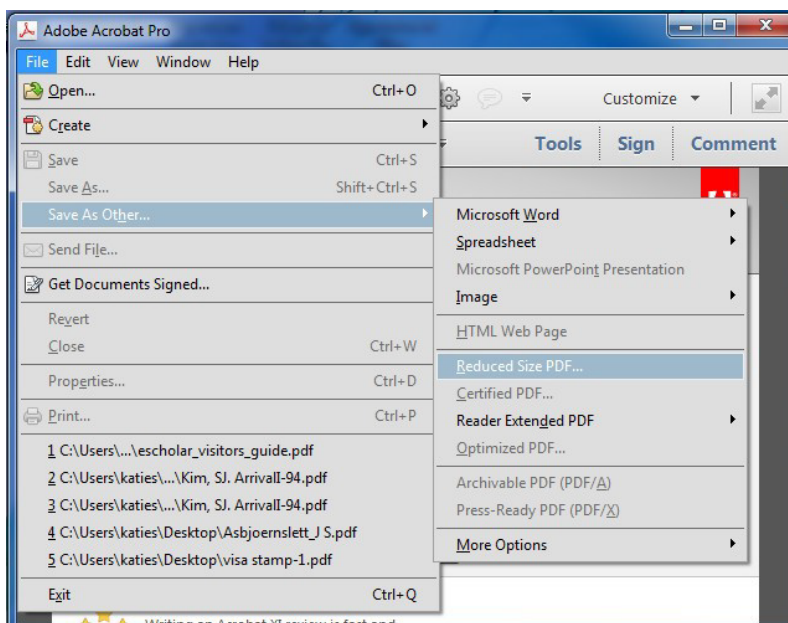


5. Once files are selected, click Combine Files
6. Save the newly created PDF to your computer and upload the document to ISD

## How to Reduce the Size of a PDF

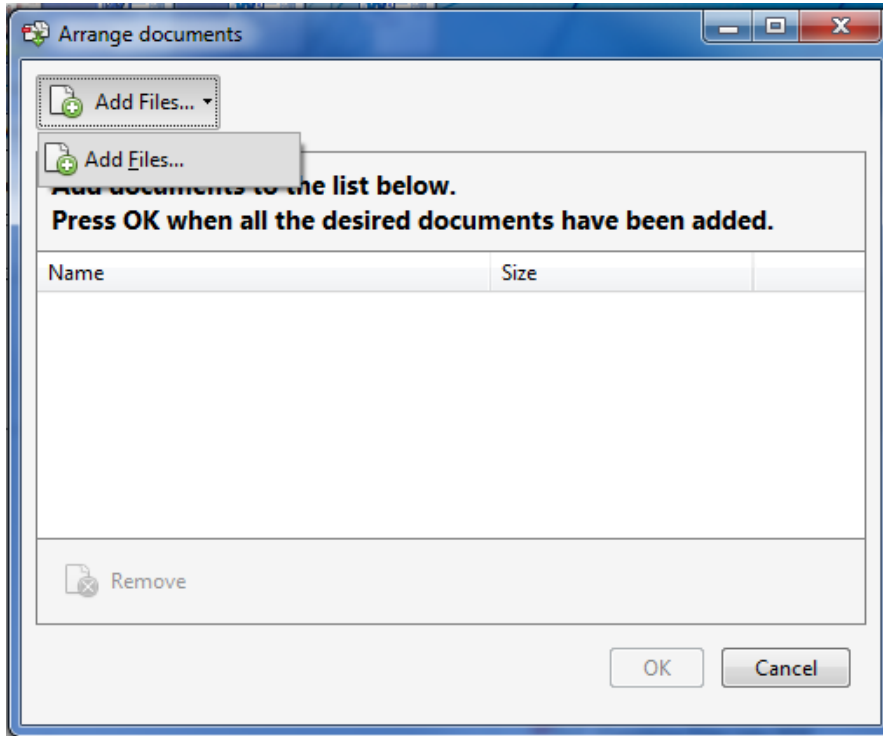
If you are having trouble uploading a PDF to ISD due to the large document size, try reducing the size of the PDF

1. Open Adobe Acrobat
2. Select File>> Save As Other>>Reduced Size PDF



## Bundle Documents into a Single PDF & Reduce the PDF Size (cont'd)

3. You can drag and drop files into the dialogue box , or go to Add Files>> Add Files and select the file to be reduced



4. Once the file is selected, click OK
5. Click OK on the following two dialogue boxes. The reduced size PDF has now replaced the larger size PDF
6. Upload the PDF to ISD



# ISD Department Guide

## Adding Notes

The Notes tab is used:

- to inform the Berkeley International Office about the type of request being submitted (always be sure to indicate if the request is an "Expedite" and be sure to upload the Expedite IOF to the Documents tab)
- to specify scholar's email for DS-2019 electronic transmission
- to add comments about the scholar's case
- to specify if an advisor at the Berkeley International Office has already been involved in the case



From the Notes Tab in the ISD Action Bar Click **Add Note**:

- In the Subject, indicating the type of request you are submitting (For example "Extension J-1", or "New H-1B case" or "New J-1 Expedite requested.")
- Indicate the scholar's email in the Description, or the specific circumstances that necessitate the scholar not receive their document via DocuSign
- If the scholar will be traveling internationally add a note with travel information. If there is any additional information you would like to include about this scholar include this in the description as well.

This tab contains all notes information for the visitor		
Date Last Edited	Subject	Description
10/4/2023	J-1 Initial Request	Confirmed email to send: oskibear@berkeley.edu. HR Partner is Jane Smith (jane.smith@berkeley.edu)

# ISD Department Guide

## Review and Submit Process

- Click on **Tasks** from the ISD Action Bar
- Click **Review and Submit Visitor's Information**
- Check that the correct profile type is selected (J-1 or H-1B) and update if needed. The Profile Subtype should always be "Scholar"
- If all information is correct, click on **Submit** button. This will send the information to the Berkeley International Office for processing:
- You will know that the record has been submitted because the processing stage will say "Submitted to International Office" and a message will inform you that the "Record was sent to ISSM":

Processing Stage : Submitted to International Office

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

### Review and Submit Information

**Submit**

Record was sent to ISSM.

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	Profile Type	Profile Subtype	Profile Subtype If Other
Pending	J-1	Scholar	

- 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.

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

Profile Status	Profile Type	Profile Subtype	Profile Subtype If Other
SEVIS - Pending	J-1	Scholar	

# ISD Department Guide

## Requesting an Extension

When requesting an extension, **DO NOT** create a new ISD record, or delete or edit any documents. This would require unnecessary work on your part and could create data discrepancies. If an ISD record already exists, update the record, upload the required documents, and submit the case to Berkeley International Office. If an ISD record does not yet exist, please see steps 1 and 2 below.

*If the scholar already has an ISD record with your department, skip steps 1 and 2, and start at step 3.*

1. Email [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu) or [H1B@berkeley.edu](mailto:H1B@berkeley.edu), with the subject header “ISD record request for \_\_\_\_ (name of scholar)”. In the text of the email include:
  - Passport name of scholar, Date of birth of the scholar, Current email address for the scholar, Name of the department/unit requesting the ISD record, Type of request (H-1B or J-1).
2. Berkeley International Office will respond to your email with instructions on how to proceed.
3. **Search for the visitor’s record.**
4. Edit & Update Information in the Scholar Data Bar: Review all fields and update any information that has changed.
  - a. Add or update the scholar’s local address.
  - b. Update the appointment end date. **DO NOT** update the start date of the DS-2019 for J-1 cases.
  - c. **FOR J-1 CASES:** Update the funding with the cumulative total for the entire J program. For example, if the scholar provided personal funds of \$19,200 (12 X \$1,800) for the first year and is showing personal funds of \$19,200 for the additional one-year extension, list the total amount of \$38,000 (\$19,200+\$19,200). The minimum required funding can be found in the history tab.
  - d. **For H-1B cases: Update the full-time UC Salary (annual salary to nearest dollar)**
  - e. Update The Passport and Visa tab with the new visa, I-94 and prior visa history information.
    - i. The department can gather this information from the scholar and enter it; or
    - ii. The department can ask the scholar to update the Passport & Visa information by giving the scholar access to ISD. To do so, first go to Tasks, then Edit Visitor Permissions to Read/Write if it is not already the setting. Then, Invite the Visitor.
5. **Attach required documents**
  - a. See the list of required documents for [J-1](#) or [H-1B](#).
  - b. The department may request that the scholar upload their visa documents.
  - c. Department always uploads IOF payment and appointment approval.
  - d. **Please remember to [BUNDLE](#) documents.**
6. Go to the **Notes Tab** in the ISD Action Bar and click Add Note indicating “Extension DS-2019 request” in the subject, or “H-1B extension”. In the body of the note, add any relevant information about the case including mailing instructions.
7. **Submit the Information.** To submit the information to the Berkeley International Office, go to the Tasks tab of the ISD Action Bar and click Review and Submit Visitor’s Information. Press submit. This will send the information to Berkeley International Office for processing.
8. **For H-1B cases only: Department brings Department of Homeland Security Checks.** Attach a memo indicating the name, date of birth, and host department of the scholar.

# ISD Department Guide

## After Submitting to Berkeley International Office

- After submitting a scholar's information, do not make any further changes to the record unless requested by the Berkeley International Office.
- If you need to make changes after submission, please contact the Berkeley International Office.
- Do not resubmit the record, as this may cause data discrepancies or duplicate records.
- The ten working days processing time for J-1 cases starts when the complete request has been submitted. The 30 calendar days for H-1B cases starts when the complete request has been submitted and the check has been received. You can check the history tab to see when the record was submitted to Berkeley International Office.
- If documents are missing or information needs clarification, the Berkeley International Office will contact you and give you instructions, and will change the processing stage to **Department Review Requested**.
- For J-1 cases, once the DS-2019 has been issued and finalized, Berkeley International Office will follow your instructions in the notes tab and send the Form(s) DS-2019 to the scholar via DocuSign. H-1B cases will be submitted to the California Service Center, and Berkeley International Office will notify you when the receipt notice is received.

## History Tab

- The history tab allows the department and Berkeley International Office 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.
- For J-1 cases the history tab also includes a calculation of the required funding for the scholar and applicable dependents based on the dates of the appointment.
- Visitors cannot view the history tab. Only the Department and the Berkeley International Office have access to this feature.

The screenshot shows the top navigation bar with the text "Welcome, admin test | My Account | Help | About | Sign Out". Below this is a blue banner with the text "NOT LIVE DATA!!!!". The main content area displays visitor information: "Visitor : Test Sunnyguard", "Campus ID :", "fsaScholar ID : FS363", "Academic Department : Academic Personnel", "Visitor Status : Active", and "Processing Stage : Pending Department Review". A "Compose Email" button is visible in the top right. Below the information is a horizontal menu with tabs: "Tasks", "Notes", "Documents", "Forms", "History", "Biographical", "Address", "Appointment", "Site Of Activity", "Funding", and "Other". The "History" tab is circled in red. At the bottom left, the word "History" is displayed with a small icon.

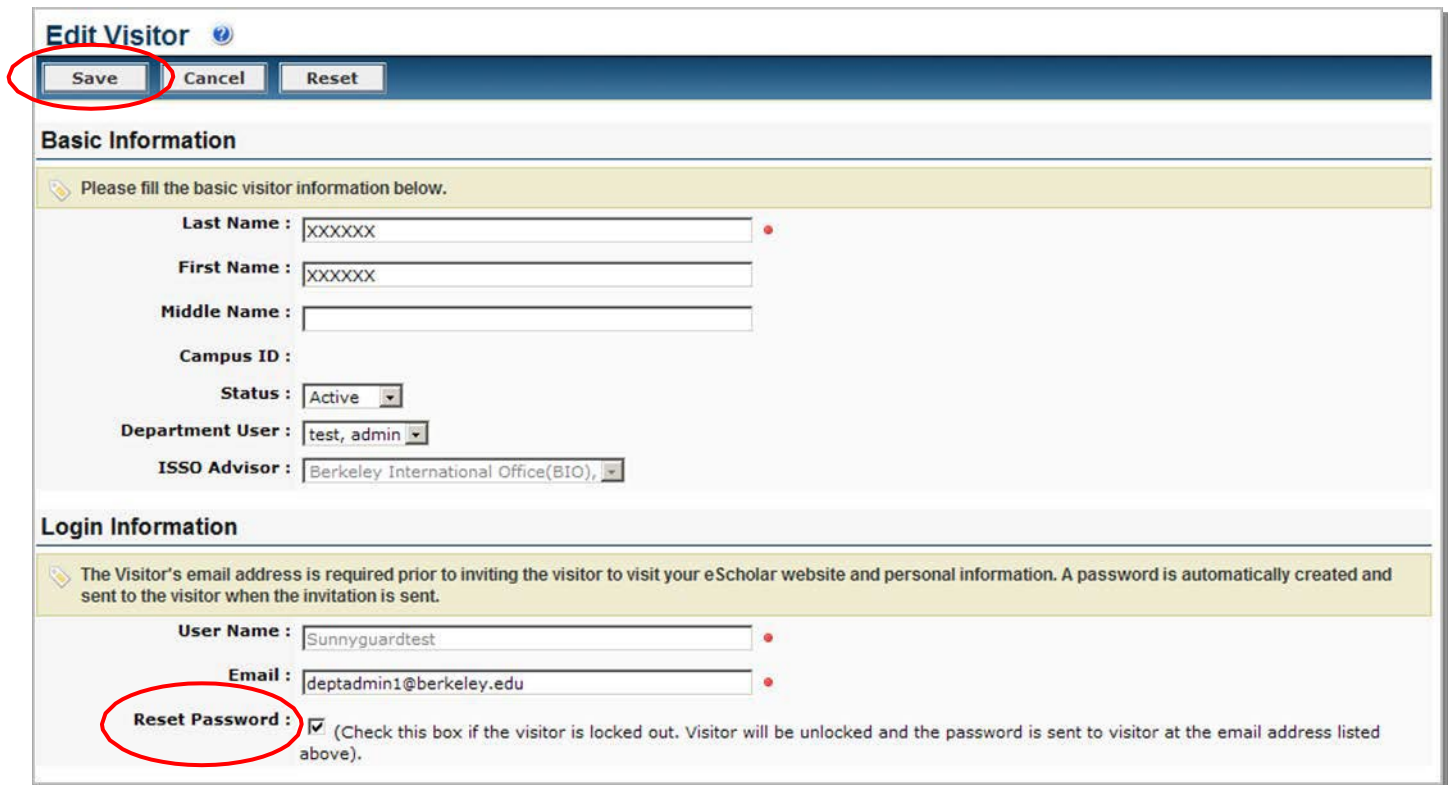
# ISD Department Guide

## Other Features: Email

If the department wishes to keep a record of the emails sent to the scholar, using the ISD email feature will save the message in the visitor's record under the History Tab. If the scholar replies to the email, it will be sent directly to the department administrator.

## Resetting the Visitor's Password

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



The screenshot shows the 'Edit Visitor' form with two main sections: 'Basic Information' and 'Login Information'. In the 'Basic Information' section, fields for Last Name, First Name, Middle Name, Campus ID, Status (Active), Department User (test, admin), and ISSO Advisor (Berkeley International Office(BIO)) are visible. In the 'Login Information' section, fields for User Name (Sunnyguardtest) and Email (deptadmin1@berkeley.edu) are present. The 'Reset Password' checkbox is checked and circled in red. The 'Save' button at the top left is also circled in red.

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

## ISD feedback

We welcome your input and feedback on ISD. Email [jscholar@berkeley.edu](mailto:jscholar@berkeley.edu), or [H1B@berkeley.edu](mailto:H1B@berkeley.edu), or call Berkeley International Office at (510) 642-2818 to provide feedback on how it is working for you.