J-1 Scholar Tutorial for UCSC Staff

UNIVERSITY OF CALIFORNIA, SANTA CRUZ
INTERNATIONAL EDUCATION OFFICE
INTERNATIONAL SCHOLAR & STUDENT SERVICES
Overview of the Exchange Visitor Program
The Purpose of the J-1 Exchange Visitor Program

“...To increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchanges...”

~The Mutual Educational and Cultural Exchange Act (Fulbright-Hayes Act of 1961)
WHAT IS THE J-1 EXCHANGE VISITOR (EV) PROGRAM?

- Created by the U.S. Department of State (DOS) for purpose of educational and cultural exchange

- Monitored electronically by the Student Exchange Visitor Information System (SEVIS)

- Allows J-1 Scholars to hold appointments at UCSC
The International Scholar and Student Services Office (ISSS):

- Interpret U.S. immigration regulations
- Serve as a liaison to appropriate local, state, and federal government agencies
- Issue/Update DS-2019 changes
- Advise J-1 scholars on immigration status
- Hold orientations and workshops to advise J-1 scholars on Tax, Employment beyond J-1 in the U.S.
- Hold social functions, i.e. Coffee Socials, Hikes, Bowling, Annual picnic, etc.
- Report mandated scholar information to the USCIS
Who Are UCSC’s J-1 Scholars?

- Foreign nationals who have been extended to a non-tenure track UCSC academic appointment

- Activities may include research, teaching, consultation, observation, training, or demonstrating expert knowledge

- Can be a courtesy or paid appointment

- 300-350 J-1 Scholars per year

- Scholars may participate in 3 EV categories
# J-1 Scholar Categories

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>MAXIMUM STAY</th>
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<tbody>
<tr>
<td>Short Term Scholar</td>
<td>6-months</td>
</tr>
<tr>
<td>Research Scholar</td>
<td>5-years</td>
</tr>
<tr>
<td>Professor</td>
<td>5-years</td>
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Legal Documents
Understanding SEVIS

Student Exchange Visitor Information System (SEVIS)

- Immigration & Customs Enforcement (ICE) launched in 2002
- Database responsible for monitoring scholar programs
- Bridge for multiple government agencies to access scholar records
Legal Documents

DS-2019 Form

- ISSS accesses SEVIS to issue DS-2019 form
- Scholar uses form to schedule and apply for visa
- SEVIS Identification Number located in top right hand corner
Legal Documents

**Visa**
- Issued by Consulate Abroad
- Allows legal U.S. entry
- Entries can be limited
- Renewal only required if scholar departs U.S. & visa is expired
- Not required for Canadian citizens
- Cannot renew within U.S.
Legal Documents

Passport

Valid at least 6-months into future at all times

May be renewed in US
Legal Documents

- I-94/admission number
- Records “J-1” status
- Stamped “D/S” (Duration of status)
- Since May 2013, no longer receive a paper copy at Port of Entry. Instead will be provided with a CBP admission stamp on passport. Visitors can access by going to: www.cbp.gov/I94
J-1 Scholar Eligibility
J-1 Scholar Eligibility

**Department of State Requirements**
- Non-Tenure Track Position
- Non-Immigrant Intent
- Meets Financial Requirements
- Graduate Level or Above
- Sufficient English Language Proficiency
- Available Funds to Purchase Insurance for Entire Program
- Not Subject to 12 or 24 Month Bar

**ISSS Requirements**
- Academic Appointment
- Non-Tenure Track Title
- Activities Take Place at UCSC or Facility with Official UCSC Affiliation

*Scholars must submit proof of insurance for self and dependents for entire program duration at their J-1 Orientation*
Financial Requirements

- Scholar must be able to demonstrate the following monthly income for the entire program duration

<table>
<thead>
<tr>
<th></th>
<th>SELF</th>
<th>J-2 Spouse</th>
<th>J-2 Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1800</td>
<td>+ $1000</td>
<td>+ $500/child</td>
<td></td>
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</table>

- Source can be UCSC funds, home institution funds, grants, scholarships, personal funds, or a combination
Proof of Financial Support

A financial verification letter is required for support NOT provided by UCSC. Letter must be issued on institutional letterhead in English and include:

- Date (not older than 6 months at time of ISSS receipt)
- J-1 Scholar name

- Amount of readily available funds (liquid assets), OR salary extended to scholar while at UCSC

- Institutional signature & title

If funding cannot be provided in U.S. dollars, attach printout of total exchange rate amount (www.xe.com) to DS-2019 Request
Financial Support Guidance

Financial Certification ‘Ranges’
- ISSS must calculate the lowest monthly amount guaranteed within financial certification letters

- If the China Scholarship Council offers 1300-1800/month, ISSS can only include $1300 as guaranteed funding. The scholar must be able to demonstrate the remaining $500/month
Scholar Invitation Process
Key Players in the Invitation Process

- Department/PI
- Divisional Coordinator
- Scholar
- ISSS
Inviting a J-1 Scholar to UCSC

**STEP 1: DEPARTMENT**
- Determines Scholar Eligibility
- Initiates DS-2019 Request/Academic Appointment
- Sends Request to Divisional Coordinator

**STEP 2: DIVISIONAL COORDINATOR**
- Confirms Appointment Eligibility
- Reviews DS-2019 Request for Completeness
- Sends Request to ISSS

**STEP 3: ISSS**
- Reviews DS-2019 Request for Completeness (Return to Division if Incomplete)
  Issues J-1/J-2 DS-2019 form(s)
- Sends DS-2019 form(s) to Divisional Coordinator
Inviting a J-1 Scholar to UCSC

**STEP 4: DIVISION COORDINATOR***
Sends the following to the Scholar:
- DS-2019 form(s)
- Visa Application Instructions
- Appointment Letter

**STEP 5: SCHOLAR**
- Applies for Visa with DS-2019 form**
- Reports to ISSS on a Wednesday (as informed by J-1 Scholar Advisor) at 10am upon arrival to U.S.

**Scholars are not eligible to apply for their visa without their DS-2019 in hand**
## Roles & Responsibilities

<table>
<thead>
<tr>
<th>J-1 Scholar</th>
<th>Department/Division</th>
<th>ISSS</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Provide Info for DS-2019 Request</td>
<td>- Invite Scholar</td>
<td>- Review DS-2019 Request</td>
</tr>
<tr>
<td>- Pay SEVIS Fee</td>
<td>- Confirm Funding/Appointment</td>
<td>- Request SEVIS Approval to Issue DS-2019</td>
</tr>
<tr>
<td>- Apply for Visa</td>
<td>- Send complete DS-2019 Request to ISSS</td>
<td>- Issue DS-2019 form</td>
</tr>
<tr>
<td>- Purchase Insurance</td>
<td>- Sends DS-2019 form to Scholar</td>
<td>- Send DS-2019 form and Visa Instructions to Division*</td>
</tr>
<tr>
<td>- Attend Mandatory Orientation</td>
<td>- Direct Scholar to ISSS for Orientation</td>
<td>- Report Program Changes to SEVIS</td>
</tr>
<tr>
<td></td>
<td>- Report Program Changes to ISSS</td>
<td>- Provide Expert Regulatory Advice to Clients</td>
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</tbody>
</table>
The DS-2019 Request

International Scholar and Student Services (ISSS)

REQUEST FOR FORM DS-2019 FOR NON-TENURE TEACHING OR RESEARCH POSITIONS

This process is initiated by the UC Santa Cruz sponsoring department. Upon approval from the Department Chair, forward this request to the Divisional Coordinator. Incomplete requests will be returned to the Divisional Coordinator.

Please include the following:
- Copies of I-1 and any J-2 passport identity pages
- Financial certification letter (if not funded by UCSC)
- Copies of previous I-1 and/or J-2 DS-2019 forms (if applicable)
- J-1 transfer in form (if applicable)

I am requesting a DS-2019 for:
- New Appointment
- Program Extension
- Transfer In
- Change of Status

Deadline:
- 10 weeks prior to start date
- 1 month prior to start date
- 4-6 months prior to start date

Visa Type and Category:
- Short-term Scholar (research or teaching for 6 months or less)
- Research Scholar (research or teaching for more than 6 months)
- Professor (teaching for more than 6 months)
- Specialist (expert in specialized field observing/consulting for 1 year or less)

Program Dates:
Start: __________ (month/day/year)
End: __________ (month/day/year)

UC Title: __________
Specific Field: __________
Percent Time: __________

Site of Activity:
Will the scholar participate in primary activity at a UCSC-affiliated site other than 1156 High Street?
- No
- Yes (Please indicate the site, using a separate sheet if necessary):

UCSC-Affiliated Site Name: __________
Address: __________

Section A. Scholar Information. Enter all information as it appears on passport.

Family/Last Name(s): __________
Given/First Name(s): __________
Middle Name(s): __________
Gender: Male Female
Date of Birth: (month/day/year)
Place of Birth: __________
Country of Citizenship: __________
Country of Legal Permanent Residence: __________

Position in Home Country: __________
Graduate Student Researcher Professor Other (please specify): __________
DS-2019 Request Deadlines

ISSSS Must Receive DS-2019 Requests By The Following:

Scholars Arriving from Abroad
- At least 10 weeks prior to start date

Change of Status Scholars
- At least 4-6 months prior to start date

Transfer Scholars
- At least 1 month prior to UCSC start date
DS-2019 Request

Submit the Following with DS-2019 Request:

- Passport for J-1/J-2
- Financial Certification Letter (if not funded by UCSC)
- Printout of Financial Conversion if not in U.S. Dollars
- J-2 DS-2019 Request (Section F) filled out (if applicable)
- Effective January 5, 2015, also need English proficiency certification (section B)
Appointment Information

UC Title
-Must be in non-tenure track series

Specific Field
-It is best to be as general as possible

Primary Site of Activity
-If scholar will primarily participate in activity not located at 1156 High Street, list UC-Affiliated facility the scholar will conduct activities at
-If scholar will participate in a one-time off site activity within the first few weeks of the start date, complete the Addendum to Site of Activity form
Exchange Visitor Category

Work with ISSS to Select the Most Appropriate Visa Category
- Short Term Scholar (Research/Teaching up to 6 months)
- Professor (Teaching up to 5 years)
- Research Scholar (Research/Teaching up to 5 years)

Eligibility for Professor and Research Scholar status is dependent on whether the scholar is currently subject to the 12 or 24-month bar
Scholar Information

Name Must Match Exactly What Is Listed in Passport
-If the given name in the passport is listed as Jose Marcos, the first name in the DS-2019 Request should be listed as “Jose Marcos”
-Scholars tend to list “Jose” as the first name and “Marcos” as the middle name when asked

City of Birth
-List exactly as in passport rather than what scholar lists

Permanent Residential Address
-Must be the residential address, Cannot be scholar’s work address
English Language Proficiency Statement

Effective January 5, 2015, as part of the subpart A rules, the Department of State requires that J-1 Scholars demonstrate English proficiency not only to participate in their program but also to be able to function successfully on a daily basis.

Section B. English Language Proficiency Statement by Supervisor/PL (FOR NEW APPOINTMENTS ONLY)

*By signing below, I confirm that I have conducted an interview with the prospective J-1 scholar either in-person or by videoconferencing, or by telephone if videoconferencing is not a viable option and that the scholar has sufficient English proficiency not only to successfully participate in his/her program but also to function on a day-to-day basis.

Date of Interview: [ ] (mm/dd/yyyy)

Time of Interview: [ ]

Method Used to Interview (circle one): in-person / videoconferencing / telephone

Certification by the Sponsoring Professor

[ ]
Financial Support

- Confirm scholar meets minimum financial requirements

- List scholar’s total amount of funding in appropriate area

- Include financial certification letter (if applicable)

- Print out total converted if necessary (www.xe.com)
Document Certification By Scholar

The Scholar’s attestation and signature is REQUIRED.

Section D. Document Certification By Scholar.

* I hereby attest that the copies of the documents that I have submitted are exact photocopies of unaltered original documents. I understand that I may be required to submit original documents to an immigration, consular, or UCSC school official at a later date.

<table>
<thead>
<tr>
<th>Scholar Name</th>
<th>Scholar Signature</th>
<th>Date</th>
</tr>
</thead>
</table>
Signature Authorization

Please make certain that all signatures are obtained otherwise the form will be considered incomplete.
J-2 Dependent Information

Eligibility
-Spouse or unmarried child under 21 years
-Contact ISSS for same sex marriages

J-2 DS-2019 Request
-Include dependent passports with DS-2019 Request
-Complete biographical information
DS-2019 Request for Change of Status Scholars
Change of Status (COS) Requests

Definition
-Nonimmigrant currently in the U.S. in another legal status who wishes to apply for J-1 status without departing the United States
-Typically an F-1 OPT student applying for J-1 Scholar Status

Eligibility
-Must meet all requirements of new J-1 Scholars
-Contact ISSS if scholar is currently in a legal status other than F-1
Change of Status (COS) Requests

Guidance
-USCIS COS approvals generally take 4-6 months
-Prospective J-1 scholars cannot begin UCSC appointment until scholar receives USCIS approval documents in hand
-Prospective J-1 scholar and J-2 dependents cannot travel abroad while the COS is pending. This will terminate USCIS request.

Additional Documents to Include With Your DS-2019
-Previously issued F-1/F-2 1-20 forms (if applicable)
-I-797 Approval Notices(if applicable)
-EAD Card (if applicable)
-Current F-1/F-2 I-94 Card(s)
Change of Status (COS) Requests

Process

- Department submits DS-2019 Request to Division
- Division submits DS-2019 Request to ISSS
- ISSS issues DS-2019 form
- ISSS sends DS-2019 to Division with USCIS COS guidelines
- Division sends DS-2019 to scholar
- Scholar independently applies for COS with the USCIS
- Scholar contacts ISSS upon arrival to validate SEVIS record
- ISSS notifies Department and Division COS approval
DS-2019 Requests for Scholars Transferring to UCSC
Transferring Into UCSC

Definition
J-1 Scholar who is participating in their exchange visitor program at another University in the United States who wishes to continue their J-1 program at UCSC

Eligibility
- Must meet all requirements for new J-1 Scholars
- Must be continuing program in same EV category
- Must be continuing program with same research/teaching objective
- Scholars who have received a waiver of the 212(e) home residence requirement are ineligible for transfers (ISSS captures 212(e) information in the Transfer In form)
Transferring Into UCSC

Guidance
-ISSS is unable to issue J-1/J-2 DS-2019 until UCSC appointment start date. This is a limitation placed on institutions by SEVIS.
-Scholars should not travel abroad while their transfer is pending.

Additional Documents to Include with DS-2019 Request (Copies)
-Completed UCSC Transfer-In form
-J-1/J-2 DS-2019s from current and previous institutions
-J-1/J-2 I-94 Cards
Transferring Into UCSC

Process
- Department submits DS-2019 Request to Division
- Division submits DS-2019 Request to ISSS
- ISSS processes request (but is unable to issue a DS-2019)
- ISSS emails scholar to notify him/her of Mandatory J-1 Orientation
- Scholar attends Orientation, and submits all legal documents
- ISSS is then able to issue the transfer DS-2019 form
- Scholar picks-up transfer DS-2019 at ISSS office
- ISSS sends copy of DS-2019 to Division
After the DS-2019 is Issued

(GUIDANCE SPECIFIC TO SCHOLARS ARRIVING FROM ABROAD)
After the DS-2019 is Issued

With the DS-2019 form, the Prospective Scholar Will:
-Review visa application instructions at the U.S. embassy website where they will apply for their visa (www.usembassy.gov)
-Pay the SEVIS I-901 fee ($180)
-Complete the Visa Application
-Pay the Visa Application Fee ($160)
-Schedule a visa interview

**Canadian Citizens:** do not need to apply for a visa. Canadians must still present a SEVIS fee receipt and a valid passport, as well as their DS-2019 form to enter the U.S. with J-1 status.
After the DS-2019 is Issued

Administrative Processing
- Process whereby the USDOS has found grounds for a thorough review of the scholar’s background before issuing a visa
- USDOS has requested interested parties wait 60 days from the date the visa interview before submitting follow-up consulate inquiries

Delay in Arrival Due to Administrative Processing (or other reason)
- Contact ISSS with the agreed upon amended start date
- Upon Divisional approval, ISSS will issue an updated DS-2019
- The Division will send the updated DS-2019 to the scholar to present to the U.S. Port of Entry
Scholar Arrival Procedures
Arrival Procedures

Reporting Requirements
-Scholar must attend a mandatory ISSS Orientation, offered bi-weekly on Wednesdays at 10 am. The J-1 Scholar Advisor will email them beforehand. Scholars must check in with required legal documents (including proof of insurance for entire program duration)

-ISSS must validate the scholar’s record in SEVIS or the record will automatically terminate. ISSS cannot complete this task without the scholar attending orientation and submitting all legal documents to verify legal status

-Scholar must apply for their Social Security Number at the Social Security Administration (SSA) Office
Arrival Procedures

Social Security Number Eligibility
- The scholar’s SEVIS record must be validated
- The scholar must be physically present within the U.S. at least 10 days

Applying for the Social Security Number
- Scholars must bring their passport, I-94 card, DS-2019 form, and UCSC appointment letter to the SSA office
- Scholars will apply in person and the SSN will be mailed to the address listed on their application within 7-10 business days
- 169 Walnut Avenue, Santa Cruz, (831)-426-8111
- 315 Main Street, Suite A, Watsonville, (831)-722-7141
Federal Reporting Requirements
(DEPARTMENTS/DIVISIONS REQUIRED TO NOTIFY ISSS)
Reporting Program Changes

Regulation require that changes to EV programs be SEVIS authorized prior to the event. Common changes:

- Address (report to ISSS within 10 day via email)
- Financial Updates
- Additional Sites of Activity & Payment/Reimbursement Authorization (for UCSC or Non-UCSC reimbursements or payments - Must be approved prior to participation)
- Program Shorten (if scholar will complete earlier than anticipated)
- Program Completion Abroad (if scholar will travel abroad earlier than program end date and not return to the United States)
- 212(e) Waiver Approval
Extension of Program
Extension of Program

Definition
UCSC J-1 scholar whose appointment will be extended

Eligibility
Must meet all requirements for new J-1 Scholars
Must be continuing program in same EV category
Must be continuing program with same research/teaching objective
-Scholars who have received a waiver of the 212(e) home residence requirement are ineligible for extensions (Scholars are required to report this information to ISSS)
Extension of Program

Additional Documents to Include With DS-2019 Request (copies)
- Passport copy (optional)
- Insurance card if insurance has been purchased for extension period or will automatically be extended (optional)
Extension of Program

Process
- Department submits DS-2019 Request to Division
- Division submits DS-2019 Request to ISSS
- ISSS processes request
- ISSS emails scholar to request proof of insurance
- Scholar submits proof of insurance
- Scholar picks up DS-2019 at ISSS office
- ISSS sends copy of DS-2019 to Division
Transferring Out of UCSC
Transferring Out of UCSC

Definition
- UCSC J-1 scholar who will continue their exchange visitor program at another University in the United States

Eligibility
- Must have hard copy of invitation letter from new school
- Must be continuing program in same EV category
- Must be continuing program with same research/teaching objective
- Scholars who have received a waiver of the 212(e) home residence requirement are ineligible for transfers
Transferring Out of UCSC

Guidance

-Scholars will not be issued their transfer DS-2019 form until after the appointment start date at the new school. This is a limitation placed institutions by SEVIS

-Scholars should not travel abroad while their transfer is pending
Transferring Out of UCSC

Process
-Scholar is offered appointment at new school
-Scholar initiates UCSC Transfer Out form and requests Department and Division approval
-Scholar submits approved Transfer Out form with the new appointment letter to ISSS
-ISSS transfers the scholar’s SEVIS record to new school
Completion of Program
Completion of Program

Requirements
-Scholars must email their departure date, airport, airline and flight number to ISSS to complete out their program

Grace Period
-Scholars may depart the U.S. up to 30 days after the program end date listed on their DS-2019 form
-This grace period cannot be used for continued employment or international travel and re-entry in J-status
-It is an immigration violation for scholars to remain in the U.S. past their grace period
EV Program Review
DS-2019 Form
- Is used for new initial scholars, scholars transferring into UCSC, scholars applying for a J-1 change of status, and program extensions

Arrival Procedures
- Scholars are required to check in with ISSS the first Wednesday they arrive in the United States

Program Changes / EV Program Review
- Departments and Divisions are required to report program changes to ISSS before the event has taken place

ISSS Advisors are your advocates
International Scholar & Student Services

Contact Us

International Education Office
Classroom Unit Building, Room 101
Mailstop IEO/ISSS
(831) 459-3550
http://www.ieo.ucsc.edu

Jvisa@ucsc.edu
Thank You

Feel free to review our J-1 Scholar website for additional information:

http://ieo.ucsc.edu/intl-scholars/j1/index.html