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Introduction

What is International Scholar Dossier (ISD)?
ISD is a database system shared between the Dashew Center for International Students and Scholars, UCLA departments and prospective international scholars. It is used to gather required information about the international scholar’s program in order to create the DS-2019 form. This database is used for J-1 scholars. ISD is currently only used for NEW or TRANSFER DS-2019 Requests.

The Request Process
After being invited by the UCLA 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 themselves. After the administrator reviews the data entered by the scholar, completes the departmental data, and uploads the required documents, they send it electronically to the Dashew Center. The Dashew Center 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 PDF, reducing the need to submit paper documents by mail. The required documents will be uploaded into the scholar’s record prior to submission to the Dashew Center.

ISD Training and Login Information
You will be given access and login information after attending an ISD training. If you have not yet attended a meeting, please email dcissj1unit@saonet.ucla.edu for available training dates and instructions on how to register.

We hope that this system will benefit you as a UCLA administrator. Please contact us if you have any questions or suggestions.
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-dept.uclanet.ucla.edu/Login.aspx

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 dcissj1unit@saonet.ucla.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 they have 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 their 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 to the record (see “Checklist of J-1 Scholar Documents” in Table of Contents for requirements).
6. Add a note:
From the ISD Action Bar add a Note to inform the Dashew Center of the type of request being submitted, for example “New J-1” or “Transfer J-1”.

- Indicate if you have attached a FedEx airbill. If there is any other information you would like to communicate, please enter this in the Notes.

7. Submit to the Dashew Center:
- 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. Dashew Center 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 15 business days from the receipt of a complete ISD record for J-1 cases.
Tips for Success

- **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 in 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 will cause technical problems. Rather, please hit cancel, email dcissj1unit@saonet.ucla.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 (*).

- **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 their invitation email.

- **Error Messages.** If you receive an error when submitting a record to the Dashew Center contact us at dcissj1unit@saonet.ucla.edu
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-dept.uclanet.ucla.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 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.

Remember to click “Save” to save the changes.
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, Amendment and Extension Request Forms, and Checklist of required documents. The welcome page also includes the J-1 restrictions.

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.

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.
Adding a Visitor’s Record

If the scholar did not show up in your search, click Add Visitor on the upper left side of the screen under Record Manager.

- 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 “UCLA_Scholars_Request.”

- 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 SAVE before proceeding to the next Tab.
Duplicate Records
ISD will now check if there is a record in the UCLA Dashew Center database with the same name that you have entered. A record may exist if the scholar is currently at UCLA or if the scholar has been at UCLA in the past.

In such cases, DO NOT SELECT ANY OF THE RECORDS. Instead, click Continue without selecting any of the existing records.
Inviting a Visitor
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.

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.
Inviting a Visitor (cont’d)

2. The second part, added automatically by the system, will contain the username, password and the URL to the visitor section of ISD: https://isd-vis.uclanet.ucla.edu/Login.aspx

Welcome to the Department of (). UCLA will need the following information from you in order to process the necessary visa document for your upcoming visit to UCLA. 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 UCLA. Please use the below username and password information to login into the url specified

URL = https://isd-vis.uclanet.ucla.edu/Login.aspx
UserName = geneblock
Password = 1f5j7DjuV.?O+5

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 their part of the process.
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**

Click **SAVE** before proceeding to the next Tab.
Editing and Updating Information in the Scholar Data Bar

There are 10 sections within the ISD Data Bar: Biographical, Address, Appointment, Site of Activity, Funding, Position in Home Country, Passport and Visa, Education, Current US Institution, Dependent-Specific.

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.

Sections that can be filled out by either the department or the scholar include the following:

- Biographical
- Address
- Position in Home Country
- Passport and Visa
- Education
- Current US Institution
- Dependent-Specific

Sections that can only be filled out by the department include the following:

- Appointment
- Site of Activity
- Funding

There are no sections that can only be filled out by the scholar.
Instructions for Tabs
In each section, fields marked with a red dot are required. Click SAVE after completing each section to move on to the next tab.

Biographical Tab:
In most cases, the biographical information will be entered by the visitor if you’ve invited the scholar to fill out the application. 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. The only required field in this section is the scholar’s email 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.
- Mailing: The scholar’s address to which documents will be sent to, along with the scholar’s email address and phone number.

Appointment Tab:
- In the Program Start Date, Program End Date, and Appointment Title fields, enter information based on UCLA’s appointment approval.
- For J-1 scholars select either “Research Scholar”, “Professor”, or “Short-Term Scholar” as the J-1 visitor category. For undergraduate researchers, select “Student Non-Degree.” Click here for category information. Only under special cases do we use the “Specialist” category. Please contact DCISS for further information regarding the “Specialist” category.
- In Subject of Activity, enter a brief description of what the scholar will be researching or teaching while at UCLA.
- Enter if the primary activity is Research, or Teaching.
Instructions for Tabs (cont’d)

Site of Activity: Click “Add new”

- Select “Yes” for the scholar’s primary site of activity. The hosting department should always be listed as the primary site of activity.

- In Prefill SOA field, choose the UCLA Department Name from the scroll down. Site of activity information will be automatically populated into the fields below.

- If department name is not listed under Prefill SOA field or the department address is incorrect, you can enter the information manually into the Site of Activity fields.

- Click SAVE.

- If there will be multiple sites of activity, click “Add New” to add another site of activity. Include all sites at which the appointment will be performed. Notify the Dashew Center of any changes to site.

Click SAVE before proceeding to the next Tab.
Instructions for Tabs (cont’d)

Funding:

- All funding must be guaranteed, and documentation must be uploaded.
- All funding must be translated into English 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, $17,829.56 should be entered as 17830).
- The funding listed must cover the start date through end date of the Form DS-2019.
- A scholar is required to document at least $2,247/month, plus $500/month for a spouse, and $222/month per child.

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

<table>
<thead>
<tr>
<th>Heading</th>
<th>Field name</th>
<th>Instructions</th>
<th>Documents to Upload</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Sponsor Funds</td>
<td>Program Sponsor Funds (UCLA issues check)</td>
<td>Enter total amount of funds the scholar will receive from a UCLA Source.</td>
<td>The appointment letter/memo signed by a dean, chair, or PI with appointment dates, salary, percentage, and title must be uploaded.</td>
</tr>
<tr>
<td>Government Funds</td>
<td>Home Government Funds (in US$)</td>
<td>Enter total amount of funds the scholar will receive from their home government.</td>
<td>Official award letter/document on letterhead with amount, dates, and any other parameters of the agreement.</td>
</tr>
<tr>
<td></td>
<td>Name of Government Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Organization Funds</td>
<td>Other Organization Funds (in US$)</td>
<td>Enter amount of funding supplied by an outside source such as the scholar’s employer or a third party organization.</td>
<td>Official award letter/document on letterhead with amount, dates, and any other parameters of the agreement. Please note: we do not accept pay stubs as the sole proof of funding.</td>
</tr>
<tr>
<td></td>
<td>Name of Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Funds</td>
<td>Personal Funds (in US$)</td>
<td>Enter total amount of funds from the scholar or private individual’s personal funds.</td>
<td>Upload bank statement as well as an affidavit of support letter if funding is from a source other than the scholar.</td>
</tr>
<tr>
<td></td>
<td>Sponsor’s relationship to visitor (i.e. parent, spouse, etc.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Instructions for Tabs (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:

- *Is the scholar requesting a change of status to J-1 inside the U.S.?* If the visitor is requesting to change status from another visa classification to J-1, consultation with a J-1 Advisor at DCISS is required to discuss the process at least four (4) to six (6) months prior to the begin date.

- *Has the scholar ever been to the US on J-1 status in the past 2 years?* If yes, upload all previous DS-2019s. If the scholar has ever been in the U.S. on J-1 status. Upload copies of the previous DS-2019 forms in the documents tab. If this is a repeat visit and you have questions about the scholar’s eligibility for J status, contact dcissj1unit@saonet.ucla.edu.

- *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 DCISS to discuss the case.

Education:

- Indicate whether the scholar is currently enrolled in a degree program and list all degrees earned and degree programs currently enrolled in.

Current U.S. Institution:

- Indicate whether the scholar is currently employed in the U.S. or will be affiliated with another institution while at UCLA.

Dependent-Specific:

- Add all dependents that will be accompanying the scholar. Only legally married spouse and children can be added as dependents.
Attaching Documents
Before submitting an ISD record to the Dashew Center, all required documents must be uploaded.

1. Click on the Documents tab from the ISD Action Bar.
2. Click “Choose File” to locate the file you will upload and select the document.
   a. **PDF documents only.**
3. Click Document Name and enter a description of the document (i.e. “CV”).
4. Click on document type. Scroll down to select the type of document.
5. Click Save.

**Documents that can be attached cannot be larger than 4 MB.** You also cannot add more than 100 MB of files at one time.
Checklist of J-1 Scholar Documents

**New Requests**

1. **DS-2019 Department Approval Form** with signatures from Faculty Advisor and Chairperson.
2. **Copy of the picture page of the passport** for scholar and each dependent if applicable.
3. Documentary evidence of **financial support in English**. 51% of required funds must come from non-personal sources (e.g. scholarship, grants, UCLA funds) for J-1 non-degree student categories.
4. **Departmental Recharge Form** – Refer to the Dashew Center website for required fees.
5. Scholar’s **Resume/CV**
6. **Memo from the faculty supervisor**, addressed to Dashew Center, J-1 Unit, UCLA Exchange Visitor Program. Include in the letter the exchange visitor’s name, title of UCLA appointment (if applicable), and a detailed description of activities the EV will undertake, including breakdown of percentages of duties/activities (i.e., teaching, research, observation, training, attending conferences), the site where the research will take place, etc.
7. **Appointment Approval Documents**, may include any of the following: Employment Offer Letter, Signed Visiting Scholar Appointment Form, VGR approval email notification from Graduate Division, or Approval email notification from Undergraduate Research Center (URC).
8. **Certification of English Language Proficiency**
9. **Copies of previous DS-2019 forms** if scholar has participated in a J-1 program within the past 2 years.

**Transfer Requests**

In addition to the documents listed for New Requests, the following is also required for Transfer Requests:

1. Copy of current DS-2019 form
2. Copy of current J-1 visa stamp
3. Copy of most recent I-94 admissions record
4. **Transfer-In Request Form**
5. Proof of current medical insurance
6. **J-2 Documents (if applicable)**
Adding Notes

The Notes tab is used:

- to inform the Dashew Center about the type of request being submitted: New or Transfer
- to specify mailing instructions
- to add comments about the scholar’s case
- to specify if an advisor at the Dashew Center has already been involved in the case

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

- In the Subject, indicate the type of request you are submitting (For example "New DS-2019 Request", or "Transfer DS-2019 Request")
- In the description, indicate whether a FedEx label has been uploaded or indicate the mailing instructions including the FedEx account number and address.
- If there is any additional information you would like to include about this scholar include this in the description as well.
Review and Submit Process

- Click on Tasks from the ISD Action Bar.
- Click Review and Submit Visitor’s Information.
- **Profile Status** should always be “SEVIS-Pending”. Update if needed.
- **Provide Type** should always be “J-1”. Update if needed.
- **Profile Subtype** should be “Scholar” or “Other”. Only choose “OTHER” if the request is for a visiting student researcher and choose VGR or URC under Profile Subtype If Other.
- If all information is correct, click on Submit button. This will send the information to the Dashew Center 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”:

![Submit Information Image]

- 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.
After Submitting to the Dashew Center

- After submitting a scholar’s information, do not make any further changes to the record unless requested by the Dashew Center.

- If you need to make changes after submission, please contact the Dashew Center.

- Do not resubmit the record, as this may cause data discrepancies or duplicate records.

- The 15 business day 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 Dashew Center.

- If documents are missing or information needs clarification, the Dashew Center will contact you and give you instructions, and will change the processing stage to **Department Review Requested**.

- Once the DS-2019 has been issued and finalized, the Dashew Center will follow your instructions in the notes tab for mailing the DS-2019 form.

Processing Stages
A list of the ISD processing stages and descriptions are provided below. Processing stage of a specific record can be found under SEARCH RESULTS.

- **Initial**: Department has created visitor’s record.
- **Invited**: Visitor has been invited by the department.
- **Pending Scholar Data Entry**: Visitor logged in and started the application.
- **Pending Department Review**: Visitor submitted information to the department.
- **Submitted to International Office**: Department submitted application to DCISS.
- **Pending Advisor Review**: DCISS is currently reviewing the application.
- **Department Review Requested**: DCISS has requested additional information from department.
- **BLANK**: DS-2019 has been processed.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Academic Department</th>
<th>Campus ID</th>
<th>hsScholar ID</th>
<th>Status</th>
<th>Processing Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lui</td>
<td>Lui</td>
<td>tested</td>
<td>PS1</td>
<td>Active</td>
<td></td>
<td>Pending Scholar Data Entry</td>
</tr>
<tr>
<td>Block</td>
<td>Gene</td>
<td>tested</td>
<td>PS2</td>
<td>Active</td>
<td>Invited</td>
<td>Invited</td>
</tr>
</tbody>
</table>
History Tab

- The history tab allows the department and the Dashew Center 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 Dashew Center have access to this feature.

### History

**Visitor**: First_testWAC Last_testWAC  
**Campus ID**:  
**fsaScholar ID**: FS3  
**Academic Department**: World Arts & Cultures  
**Visitor Status**: Active  
**Processing Stage**: Pending Scholar Data Entry

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Notes</th>
<th>Documents</th>
<th>Forms</th>
<th>History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biographical</td>
<td>Address</td>
<td>Appointment</td>
<td>Site Of Activity</td>
<td>Funding</td>
</tr>
</tbody>
</table>
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.

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.