



Inviting/Hosting a Visiting Scholar to IST

IST_AC-15 Administrative Guideline

Overview

Collaboration with research is the primary reason we seek international scholars to come to Penn State to work closely with faculty on research grants and publications. The following guidelines are applicable regardless of whether the scholar is self-funded or the salary is paid through Penn State.

Policy

Please refer to [AC01 Visiting Scholars](#) for information regarding this policy.

Definitions:

Visiting Scholar - Individuals from other universities, institutions, and/or businesses who are granted access to University facilities to provide instruction that is supervised by appropriate University Personnel, to conduct collaborative research, or to observe University instruction, administration, or research and who do not receive financial support from the University for their effort.

Individual Host – Faculty member inviting the visitor to Penn State/IST. Responsible for oversight and supervision of the visitor.

Administrative Host Support-Kelly Cowher is designated to support for administrative tasks related to inviting a visiting scholar. In the event Kelly Cowher is not available, Shannon Bishop and Jeannette Macaluso will act as a backup.

Guidelines

Inviting a Visiting Scholar to the University for more than 14 Days

1. The inviting faculty member (Individual Host) sends the following information requesting permission to invite the scholar to the Dean 5-6 months prior to the visit. Administrative Host Support should be CC'd on the email to also receive the information.
 - a. Curriculum vitae (no more than 3 pages).
 - b. Specific dates for duration of stay. Visits can be up to one year with the possibility of extension.
 - c. Describe specific duties throughout the visit including mentorship/activity plan with expectations, milestones and education benefits. Other items to be included:
 - Justification of how this visit benefits IST and ties into the strategic research initiative.
 - How is the visit being funded (include budget, fund and cost center)?
 - Who will pay for any support requirements (administrative, computer, travel, etc.)?
 - Will the visitor be responsible for research at the University during the visit?
 - i. Do they require certifications or licensed training? If yes, please list out each.
 - Is there a possibility the visitor will be involved in intellectual property in Penn State facilities?

- Suggested office location/lab access.
 - d. CIP Code in the ##.#### format
 - Full list of CIP codes: <https://nces.ed.gov/ipeds/cipcode/browse.aspx?y=55>.
 - Frequently Used IST CIP Codes:
 - Data Sciences and Artificial Intelligence
 - 11.0102 Artificial Intelligence
 - Privacy and Security
 - 11.1003 Computer and Information Systems Security/Auditing/Information Assurance
 - Human Computer Interaction
 - 11.0105 Human-Centered Technology Design
 - Social and Organizational Informatics
 - 11.0104 Informatics
 - College of Information Sciences and Technology
 - 11.0401 Information Sciences/Studies
 - e. Which type of PSU access account is needed, [full or slim](#) (include budget, fund and cost center)?
2. The Dean approves or denies the visit by responding to the email request. If the request is approved, the Administrative Host Support will prepare the following documents for signature.
 - a. [Letter of Invitation](#)- University template must be used and must be signed by both the Individual Host and Dean.
 - b. Visiting Scholar Agreement
 3. Once both the Letter of Invitation and Visiting Scholar Agreement are signed by the Individual Host and Dean, the Administrative Host Support will send a welcome email to the visitor. The welcome email will include the following attachments/requests:
 - Signed Letter of Invitation
 - Signed Visiting Scholar Agreement
 - [Significant Financial Interest Disclosure Form](#) (only used for visitors working on research during the visit)
 - Request a copy of Curriculum Vitae (if not already obtained)
 - Request user create and provide user ID and 9-digit PSU ID #
 - Request a copy of Passport (if sponsorship is required)
 4. Once the visitor returns the above information, the Administrative Host Support will ensure all documents are signed and complete and will then start the [Visiting Scholar Request form](#). If the visitor is international, the Administrative Host Support will initiate the iStart process at this time.
 - a. Approvals within iStart include College of IST HR approval
 5. Once the request form and all documents have been approved, the Administrative Host Support will receive an email confirmation. When the approval is received, the Administrative Host Support will then complete the [Add Contingent Worker form](#) via the WorkLion Portal, attaching the approval notification. Completing the Add Contingent Worker form will initiate the background check process.
 - a. **The visitor cannot begin their appointment or be issued any university access until the background check is complete.**
 6. Administrative Host Support will confirm start date with Individual Host and HR and scheduled a check-in meeting.
 - a. The Individual Host must be present when the scholar arrives or have a mentor in place to welcome the scholar.

***If the visiting scholar will be at Penn State for less than 14 days, please refer to the process located [here](#).**

Securing the Proper Visa for an International

Currently the amount of time that it is taking to process an H-1B visa is several months, even with premium processing. For this reason, along with the associated filing fees, a J-1 visa will be used when a decision between using a J-1 or H-1B visa has to be made. This is, of course, based upon which process best suits the work unit and Penn State. Only in rare and unusual circumstances would an H-1B visa be utilized (i.e., five-year or more funding).

Tips to Ensure Efficient Processing of a J-1 Request

iStart Submission Deadlines:

- *Initial* requests for J-1 scholars *not in the US* must be submitted in iStart *AT LEAST 3* months in advance of the anticipated start date
 - J-1 Scholars from **China or India** must be submitted *AT LEAST 4* months in advance of the anticipated start date
- *Current* Penn State J-1 Extension requests must be submitted *AT LEAST 2* months in advance of the current DS-2019 end date

IMPORTANT: J-1 requests submitted outside the time frames listed above may result in unnecessary delays and require departmental letters to be rewritten to accommodate more realistic dates, another DS-2019 and international shipment

Best Practices:

- J-1 scholars have only 30 days from the program start date to check-in with Scholar Advising. Individual Host **MUST** consider this when requesting the start date
- Confirm the exact beginning and ending dates only after they can be agreed upon to avoid delays

Process Efficiently

- **KNOW** your scholar's travel plans and **PLAN** accordingly with the above submission guidelines in mind
- **COMMUNICATE** with Scholar Advising any changes and/or unanticipated events, such as travel plans, so that it can be accommodated with the least amount of delay

Financial Requirements

- Ensure that your J-1 Scholar clearly understands the financial requirements of his or her stay with Penn State, including health insurance for the entire family. J-1 Scholars are required to have health

insurance for the duration of their stay. Information regarding this requirement can be found here:

<https://global.psu.edu/article/j-1-scholar-medical-insurance>

- PLEASE READ the following about financial requirements, including health insurance: <https://global.psu.edu/node/176>

English Language

- J-1 scholars must be able to communicate in English
- It is a willful violation of the regulations to certify English language ability when it does not exist and could result in early termination of the program

J-2 Dependent Health Insurance

- *All* J-2 dependents must have health insurance for the entire length of the J-1 program regardless of when the J-2 chooses to depart the US
- The visa alternative to J-2 is B-2 for those dependents *who will not be in the U.S. for the entire length of the program* <https://travel.state.gov/content/visas/en/visit/visitor.html>

Chinese Scholars

- Many of our self-funded Chinese scholars depend on Chinese Scholarship Council (CSC) funding. This funding document always provides a range of dollar amounts. In the event of any range, we can only use the bottom-most figure when calculating funding levels. Please make sure that the visitor understands this and, if needed, provides supplemental funding to meet requirements!

Conclusion of Visit

- At the conclusion of the stay, visitors must complete a departure notice with Global Programs.
- Administrative Support Host will complete IST departure form and HR separation form.

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