



J-1 Exchange Visitor: DS-2019 Request Checklist- Scholar

- ☐ Communicate exchange visitor program [funding](#) and [insurance](#) requirements to prospective exchange visitor and confirm the exchange visitor has [sufficient English proficiency](#)
 - Exchange visitor scholars must pursue their program goals and objectives at least 3 days a week on the CU Boulder campus or the primary CU-sponsored work site.
- ☐ Have the exchange visitor complete the [*Scholar: Prospective J-1 Exchange Visitor Intake Form](#) (collects information for HCM record and *Add New Person* E-Form). *optional, departments may develop their own internal forms
- ☐ Complete the [*Department: Prospective J-1 Exchange Visitor Program Worksheet](#) (helps identify potential issues and identifies information required for HCM record, *Add New Person* e-form, and *Host Department Information* e-form in *DS-2019 Request*). *optional, departments may develop their own internal forms
 - Contact the [ISSS advisor assigned to your department](#) to discuss any potential issues.
- ☐ Review POI and HCM Resources
 - [POI Types](#), [POI HCM Record Practice](#), [HR Service Center's POI webpage](#)
 - [Completing the HR Service Center \(HRSC\) Person of Interest \(POI\) Form Instructions](#)
 - [Avoiding Duplicate Records](#), [Hiring an Employee in HCM](#), [Add a POI in HCM](#), [Rehiring an Employee in HCM](#)
- ☐ Determine whether the prospective exchange visitor [already has an HCM record](#).
 - Duplicate records can cause failures in online hiring steps, create tax compliance issues, and may lead to issues accessing university portals (e.g., MyISSS Student/Scholar portal, MyCUinfo).
- ☐ Create or update HCM record for the prospective exchange visitor or submit the [Person of Interest \(POI\) Form](#) to the HR Service Center (HRSC) to request assistance.
 - *If the prospective exchange visitor already has a record in HCM:*
 - Update the HCM record as necessary ([Entering Job Changes](#), [Maintaining a POI Relationship](#), [Extending the Exit Date for POI Records](#), [Rehiring an Employee](#)) to reflect the new exchange visitor program.
 - *Departments that are HRSC-supported:*
 - Submit a request to the [HRSC](#) to update the HCM record.
 - Provide the scholar's first and last name, employee ID, POI confirmation, sponsoring department, sponsor's position number, and specific record update request.
 - *Departments that are not HRSC-supported:*
 - Update the HCM record.
 - Contact the [HRSC](#) with questions or for assistance.
 - *If the prospective exchange visitor is already affiliated with the University of Colorado/CU system (previous student or scholar program) and did not previously have an Employee ID:*
 - Email the prospective exchange visitor's name, University ID from the previous program, and Employee ID from the new HCM record to the [ISSS advisor assigned to your department](#) as soon as it is generated so ISSS can add it to the prospective exchange visitor's MyISSS profile.
 - The *DS-2019 Request* cannot be initiated until ISSS adds the Employee ID to the prospective exchange visitor's MyISSS profile.

After the HCM record is created, you can submit the *Add New Person* e-form for prospective exchange visitors who *do not* already have a CU affiliation and MyISSS profile.

- Do not submit an [Add New Person](#) e-form for individuals already affiliated with the University of Colorado/ CU system through a previous student or scholar program.

- If you have questions about whether or not a MyISSS record exists for a prospective exchange visitor, contact the [ISSS advisor assigned to your department or institute](#).

Initiating the **DS-2019 Request** in the [MyISSS Departmental Services portal](#)

- ☐ Complete [*DS-2019 Request: Exchange Visitor Program Details-Scholar](#) (collects information for the *Program Information & Details* e-form). *optional, departments may develop their own internal forms

Host Department Information E-Form:

- Host supervisor name, title, email, phone, and office location
- Requested exchange visitor program DS-2019 start and end dates
- Speedtype for DS-2019 processing fee (cannot be fund 30, 31, 35, 50, 71, 72, 73,74, 78, 80, or 99)

Program Information & Details E-Form:

- Request type (initial DS-2019/ SEVIS record transfer)
- Program category (Short-term Scholar, Research Scholar, Professor, Specialist)
- ISSS-approved program dates
- Proposed exchange visitor program details
 - [CIP code](#), Academic field, Rationale for program, Program goals, General program description, Nature of supervision, Any clinical/patient activity, Position title, Position code, Percentage appointment, Number of work hours/week, Any Remote work, POI type, Benefits eligibility, Site(s) of activity, University funding, Government funding, Sponsored research, Cultural components)

- ☐ [Evaluate the English proficiency](#) of the prospective exchange visitor and obtain documentation.

If the prospective exchange visitor will be paid by CU Boulder:

- ☐ Obtain an official university offer letter (fully signed) from HR/OFA

If the prospective exchange visitor will require a J-1 SEVIS record transfer:

- ☐ You will give the scholar access to the *SEVIS Record Transfer-In* e-form as part of the *DS-2019 Request*. The prospective scholar will coordinate the release of their J-1 SEVIS record to CU Boulder.

If the host department/ research institute has an internal export control review process:

- ☐ Obtain internal export control review documentation
 - LASP: Greg Steele (Gregory.Steele@lasp.colorado.edu)
 - CIRES: Ted de Maria (demaria@colorado.edu) and Cameron Walker (cameron.walker@colorado.edu)

Internal export control review documentation must be uploaded in the Export Control Review e-form and reviewed by the [Office of Export Control](#).

- ☐ Issue an invitation letter for the prospective exchange visitor
 - [Exchange Visitor Program \(eligible for benefits\) Invitation Letter](#) (Print on Department Letterhead)
 - [Exchange Visitor Program \(NOT eligible for benefits\) Invitation Letter](#) (Print on Department Letterhead)
- ☐ Provide the prospective exchange visitor with an [Exchange Visitor Program summary document](#)
 - It should clearly explain program activities as well as the terms and conditions of the exchange visitor program, including the exchange visitor activities [job duties, number of work hours, and wages and compensation (if applicable)], itemized list of all fees charged to the exchange visitor (i.e., fees paid to the sponsor or a third party, including the host employer), insurance costs, other typical costs, conditions, and restrictions of the exchange visitor program(s), and the type, duration, nature and importance of the cultural components of the program.
- ☐ Initiate the *DS-2019 Request (Scholar)* in the [MyISSS Departmental Services portal](#). Complete required e- forms including uploading requested documentation.

- Complete the *Host Department Information* e-form. **This must be approved by ISSS before other e-forms in the DS-2019 request can be submitted.**
 - Resource for collecting information for data entry:
 - [Scholar: Prospective J-1 Exchange Visitor Intake Form](#)
- If the host supervisor is not full-time CU faculty/staff.
 - Also submit the *CU Boulder Supervisor Form*.
- Complete the *Program Information & Details* e-form.
 - Resource for collecting information for data entry:
 - [DS-2019 Request: Exchange Visitor Program Details-Scholar](#)
- Complete the *Departmental Administrator: Departmental Responsibilities & Attestation* e-form.
- Open the *Host Supervisor: Departmental Responsibilities & Attestation* e-form, enter the name and email address of the person who will supervise the exchange visitor, and submit the e-form.
- Open the *Department Chairperson: Departmental Responsibilities & Attestation* e-form, enter the name and email address of your departmental or research institution chairperson, and submit the e-form.
- Open the *Prospective Exchange Visitor Information (Scholar)* e-form and click on the “Give the Client Access to Complete this Section” link. Enter the prospective exchange visitor’s email address to send the Prospective Exchange Visitor E-Forms to the scholar to complete.
 - Required: *Prospective Exchange Visitor Information (Scholar)*; *Exchange Visitor Program Funding (Scholar)*
 - If Applicable: *Dependent Information Form (Scholar DS-2019 Request)*, *SEVIS Record Transfer-In (Scholar DS-2019 Request)*
 - The prospective exchange visitor must submit these e-forms.
 - The department cannot submit these e-forms on the prospective exchange visitor’s behalf as there are attestations developed for the prospective exchange visitor.
- Monitor the status of e-form submissions on the *DS-2019 Request* e-form group landing page and follow-up if necessary.
- **Do not initiate the *Export Controls Review* e-form until all prior required e-forms are in submitted status.**
 - The *Export Controls Review* e-form is pre-populated with the Office of Export Controls (OEC) information. Click on “Submit” to send the e-form to OEC.
 - Departments that have an internal export control review must also upload documentation of the completed internal review in the e-form.

To return to an already initiated DS-2019 request, click on “My Current Cases” tile under “Lists” in the Departmental Services portal to access the request.

- If you attempt to access an already initiated *DS-2019 Extension* request by clicking on the “DS-2019 Request (Scholar)” tile under “Tasks,” you may create a duplicate request and information may be spread across multiple requests. This will have to be manually corrected by the department which will slow the processing of the DS-2019 request as all information must be on a singular request.