Berkeley Regional Services

VISITING SCHOLAR & VISITING STUDENT RESEARCHERS REQUEST FORM – INSTRUCTION SHEET

INSTRUCTIONS

This instruction sheet describes what needs to be completed in each section of the "*Visiting Scholar and Visiting Student Researchers Form.*" If you have any questions or concerns, please contact the HR professional supporting your unit. Not sure who your HR professional is? Please use this link to find out what Region your department/unit falls under and visit the corresponding Region website to locate your supporting HR professional.

FOOTNOTES

Please refer to the Footnotes at the bottom of the second page of the form for information that may be required for the Visiting Scholar or Visiting Student Researcher appointment. Refer to image below:

[1] Applicable only if scholar needs J1 Visa.
[2] Might Impact Visa timeline.

REQUEST MUST INCLUDE

The only documents needed to process the request would be the completed form and an up-to-date copy of the Visiting Scholar/Visiting Student Researcher's CV. If a Visa is required then a J-1 IOF, SpeedType, Host Faculty Agreement, and Scholar's Proof of Funding will also be required. Please read Footnotes to determine which information/documents are required for the appointment.

1. **APPOINTMENT INFORMATION –** Required information about the appointment.

    a. **Appointment Type** – Choose the appropriate appointment type, there are currently three to choose from: CWR015 - Visiting Scholar, CWR016 - Visiting Student Researcher (Undergraduate), and CWR003 - Visiting Student Researcher (Graduate) (Guidelines for which appointment type applies - link).

    b. **Name (First Last)** – Enter the Visiting Scholar/Visiting Student Researcher's email legal name formatted First then Last.

    c. **Faculty Sponsor Name** – Enter the PI/Faculty/Supervisor that will be sponsoring (and/or funding) the appointment (i.e., Professor's name, Department Chair's name).

    d. **Email** – List the Visiting Scholar/Visiting Student Researcher's email address that will be used initially to communicate.

    e. **Faculty Sponsor Email** – Enter the PI/Faculty/Supervisor email address.

    f. **Department** – List the hiring department/unit in this field. Typically, wherever the funding is housed is considered the hiring department. The hiring department also determines the HR Region the appointment will be processed.

    g. **Start Date** – Enter the appointment start date (first day of appointment).

    h. **End Date** – Enter the appointment end date (last day of appointment).

    i. **Current Position** – List the current position or job title that the scholar currently holds (i.e., Professor, Assistant Professor, Research Specialist). For Visiting Scholars - please list the "Company Name" as this is required for the VSPA application process.

    j. **Highest Earned Degree** – List the highest degree earned/awarded.

    k. **Conferral Date** – List the date that the highest earned degree was awarded or graduate date (**Month/Year or MM/YYYY formats are acceptable**). Typically, this date is listed on the official diploma but can also be acquired from the Visiting Scholar/Visiting Student Researcher's academic institution's registrar's office in the form of a letter

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stating the date of conferral.

    l. **Institution** – List the academic institution from which the Visiting Scholar/Visiting Student Researcher acquired their highest earned degree.

    m. **Will Scholar Receive Stipend through UC Berkeley?** – Please choose "Yes" or "No" if the Visiting Scholar/Visiting Student Researcher will be receiving a stipend. If so, please keep in mind that foreign nationals will need a Glacier invite.

2. **LOCATION** – Required information for VSPA application (If this is not listed/entered, it could delay the process).

    a. **Building** – List the building that the department will be located in (i.e., Sprouts Hall).

    b. **Room Number** – List the room that the department is located in (i.e., 120).

3. **RESEARCH DUTIES** – Provide **at least 2-3 sentences** describing the Visiting Scholar/Visiting Student Researcher's research project/duties at UC Berkeley. We are unable to move forward with the hire without this information as it is required for VSPA and, if applicable, the BRS Visa Team.

4. **NOTES** – Other than responsibilities and duties, any other pertinent information should be entered here for the Academic Analyst reviewing/approving the appointment.

5. **VISA (IF NEEDED)** – This is required for International/Foreign Scholar or Student Researcher who require a Visa.

    a. **Visa Action Type** – Choose the appropriate Visa type, there are currently three to choose from: New Visa, Visa Extensions, Transfer.

    b. **CIP Code (*if known*)** – List the CIP Code if known. This is required for J-1 New/Initial/Change of Status requests. A CIP code is used to identify the area of research they will be performing and is determined based on the research topic. Refer to the link on the form to search for the appropriate CIP code.

    c. **Will the scholar bring any dependents?** – Choose "Yes" or "No." If you choose "Yes," please proceed to confirm you're bringing your spouse and/or how many children.

    d. **English Competency** – Choose one of the three that needs to be attached to the case, there are currently three to choose from: Sponsor Letter, English Proficiency Test, Letter from Home Institution. Refer to this link for documents that are required for proof of English proficiency (Applicable for International/Foreign Scholars).

    e. **Needed to Process Visa**

       i. J-1 IOF - Form required by Visa (needed for DS-2019 processing payment).

       ii. SpeedType - The speedtype allows your shipping charges to be posted automatically to the correct chartstring (see this link for FedEx process).

       iii. Host Faculty Agreement - must be signed, dated and completed by the PI/Faculty/Supervisor and the Visiting Scholar/Visiting Student Researcher.

       iv. Scholar Proof of Funding - Provided by scholar (Refer to this link for acceptable documents).

    f. **Country of Citizenship** – List the country where the scholar has citizenship.

    g. **Country of Residence** – List where the scholar currently resides.

6. **FEES** – Required information about the appointment to determine who is responsible for the fees. Click on hyperlinks to confirm fee amounts.

    a. **BIO J-1 IOF Fee** – Choose if BIO Visa fee will be paid by host/department, scholar or N/A.

    b. **Department Fee** – Choose if department/administrative fee is required and will be paid by host/department, scholar or N/A.

c.   **Medical Insurance** – Medical insurance is required for all J-1 Exchange visitors. Choose if Medical Insurance will be paid by host/department, scholar or N/A.

d.   **SpeedType (Shipping/FedEx)** – Choose if FedEx Shipping fee (if applicable) will be paid by host/department, scholar or N/A.

e.   **University Services Fee** – Choose if the University Services Fee (USF) will be paid by the host/department, scholar or N/A. The USF is completed through the VPSA application process. If the host/department is paying for the USF, please attach an IOF to the case. The fee corresponds with the dates of the appointment, and is valid for up to one year. This annual fee is not prorated. If the campus unit or faculty sponsor agrees to request a reappointment past the initial first year, a renewal USF will be due.

If fees are paid by the Visiting Scholar/Visiting Student Researcher, then the following information will be required:

f.   **Name** – Visiting Scholar/Visiting Student Researcher name.

g.   **Email** – Visiting Scholar/Visiting Student Researcher email.

h.   **Address** – Visiting Scholar/Visiting Student Researcher mailing address.

7.   **FUNDING INFORMATION** – The following fees can be paid using a dedicated form (IOF): BIO J-1 IOF Fee & University Service Fee (refer to hyperlinks on form).

a.   **Department Fee (if any)** – List amount of fee if applicable. Choose the Agency Type. If fee is paid by the host, provide funding information/chartstring here.

b.   **Medical Insurance (if applicable)** – Choose the Agency Type. If fee is paid by the host, provide funding information/chartstring(s) here.

c.   **Stipend (if applicable)** – Choose the Agency Type and provide funding information/chartstring(s) here.

d.   **SpeedType (Shipping/FedEx)** – List the amount if a FedEx shipping fee is required. Also, please list the speedtype as it is needed for Visa team.

8.   **CONTACT INFORMATION** – Required for the appointment.

a.   **Preparer Name** – Person filling out the form, the PI/Faculty/Supervisor and not the Visiting Scholar/Visiting Student Researcher.

b.   **Email Address** – Email address of the person filling out the form.

9.   **APPROVALS (AS NEEDED)** – Approvals can be either an electronic signature or an email attachment in lieu of signature.

a.   **Faculty Sponsor Name** – PI/Faculty/Supervisor that is sponsoring the scholar or student researcher (this will be auto-populated by filling out the Faculty Sponsor Name in the "Appointment Information" Section of the form).

b.   **Funding Approver Name** – RA or FA approving the funding for the appointment (only if Stipend is applicable).

c.   **Dept Chair Name** – Department Chair completed this portion of the request.

d.   **Dean Name** – Dean/VC/Academic Analyst approving appointment

RELEVANT LINKS – The following links may help answer some questions.

● Berkeley Regional Services - https://regionalservices.berkeley.edu/home

● List of Campus Deans - https://apo.berkeley.edu/quick-links/deans

● List of Department Chairs - https://apo.berkeley.edu/quick-links/chairs-deans

● Vice Chancellor for Research Office - https://vcresearch.berkeley.edu/about-us

● Berkeley International Office - https://internationaloffice.berkeley.edu/UCB_departments

- Scholar Information Meeting - https://internationaloffice.berkeley.edu/profs_researchers/scholar_information_meetings

- VPSA Website - https://vspa.berkeley.edu/
- Approval Exception Policy - https://vspa.berkeley.edu/exceptional-approval-policy
  - Examples of exceptions:
    - An initial or renewal appointment of over one year in length
    - Renewal appointments more than the allowed cumulative two-year minimum
    - A candidate who wishes to be a visiting scholar without a Ph.D. or equivalent terminal degree (holds a Bachelor's or Master's degree)
    - A candidate who wishes to be a visiting scholar with a Ph.D. or equivalent terminal degree earned within the last five years
    - A faculty sponsor requesting an initial one-year length ore renewal appointment beyond the maximum one-year length for a visiting student researcher