

J-1 Visa Request Process

Unit Readiness Toolkit



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Unit Readiness – At a Glance

- **Step 1 Get Informed**
Unit administrators and staff involved in the J-1 visa request process are encouraged to attend informational interchanges and review resource materials available on the [J-1 Visa Request Process website](#).
- **Step 2 Review Your Unit Current State**
Identify and document the people, workloads, documents, and procedures you currently have in place that relate to the J-1 visa request process.
- **Step 3 Design Your Future State**
Identify where changes need to be made in your unit to align with the new J-1 visa request process. Inform those involved about upcoming changes to workload assignments, update internal documents and procedures, etc.
- **Step 4 Communicate**
Keep faculty and staff informed about the new process, changes to workload assignments, internal procedures, timelines, etc.
- **Step 5 Staff Readiness**
Encourage staff who will remain involved in the J-1 visa request process to access resources and training.

Introduction

This toolkit offers recommendations, tips, and resources to help units prepare for the transition to the new J-1 visa request process.

The toolkit is the product of the collaborative efforts of the J-1 Improvement Team, which includes representatives from Ann Arbor campus units, the International Center, and the Shared Services Center.

Step 1 – Get Informed

We recommend that staff who will continue to participate in the J-1 visa request process – and any other interested parties - complete these steps to gain an understanding about the new process:

- ✓ Watch the J-1 Visa Request Process overview video
- ✓ Attend an informational session in September – with opportunity to ask questions!
- ✓ Review the J-1 visa request process flow diagrams to understand the roles and responsibilities in the request process
- ✓ Read the FAQs



J-1 Visa Request Process Website (<http://sscj1.wordpress.com>)

Step 2 – Review Your Unit Current State re J-1 Visa

We recommend you spend time in August and early September conducting a detailed review of the people, functions and processes currently involved in the J-1 visa request process. What do these look like today in terms of:

- The people involved in the process (faculty, staff, administrators)
- The role(s) and responsibilities of each person
- How does the process flow in your unit? Consult everyone currently involved in the process to help sketch a diagram of the people (roles and responsibilities), forms and other documents, and steps within your process. Get consensus on the current state flow. (Use value stream mapping as a recommended tool for this activity)

Step 3 – Design Your Future State

Now that you have your current state mapped, use the J-1 visa request process flow diagram(s) and other resource materials to create your new, future internal process related to J-1. Consider:

- Who is impacted by the new J-1 process? In many units, staff currently involved in the J-1 visa request process fill out internal unit forms, update M-Pathways (e.g., creating the DS-2019 form), obtain faculty / administrator signatures, etc. Their responsibilities will change somewhat as the SSC assumes some of the transactional work they currently perform.
- What additional work might they absorb to support faculty or the unit with the shift of some of their responsibilities to the SSC?
- Do internal forms need updating – and who will update them?



J-1 Visa Request Process Flow Diagram (New / Transfer exchange visitor)

Step 4 - Communicate

Communication is perhaps the most important aspect of a successful business process transition. Helpful guiding principles include:

- Communicate often – but only when there is something meaningful to share
- Be simple, clear, consistent, and transparent
- Communicate up, down, and across to reach all audiences – spread awareness to those who may just need general knowledge of the change, and foster understanding among those who will continue to be involved in the process
- Provide a feedback mechanism for questions and concerns



Sample email for units to share info with faculty and staff about the new process

Step 5 – Staff Readiness

In your unit’s future state, some or all staff currently involved in J-1 visa request processing will still play a role. We encourage these staff members to complete the following learning steps in preparation for the go live:

- ✓ Review the **Get Ready for J-1** learning module
- ✓ Become familiar with [CaseConnect](#), if you aren’t already
- ✓ Learn about the eForms you will use to submit requests for J-1 visa processing



Get Ready for J-1 (<http://sscj1.wordpress.com>)

[CaseConnect](#) overview

Overview of J-1 Visa Request eForms (<http://sscj1.wordpress.com>)

Unit Readiness Timeline and Recommended Activities

August	September	October
<ul style="list-style-type: none">• Get informed• Communicate• Current state assessment	<ul style="list-style-type: none">• Create future state• Communicate• Update internal docs, procedures• Staff readiness	<ul style="list-style-type: none">• Staff readiness• Communicate <p>Go Live October 17!</p>

Now that you’ve taken actions to prepare for the new process, let’s review some tips for submitting requests and completing steps related to the J-1 visa request process.

Before submitting an eForm request

Consider these questions:

- *Is a J-1 the appropriate visa status for the purpose of the visit and long-term intent of the exchange visitor? Consult with the International Center as needed.*
- *Are there any intellectual property issues to discuss with regard to non-employed exchange visitors?*
- *Does the exchange visitor need a written letter of invitation from your unit?*

And gather this information for completing the eForm:

- Identify a single point of contact within the unit for questions related to the request (this will likely be the person who completes and submits the eForm)
- Ensure the exchange visitor's CV is up to date, including current affiliation, title, position, degrees, etc. You will attach the CV to the eForm.
- Confirm that the EV's proposed start date allows sufficient time for processing the DS-2019 request and for the EV to obtain a J-1 visa from the U.S. consulate. A lead time of at least 8 – 10 weeks is recommended.
- Determine if the exchange visitor will be employed. If yes, obtain information regarding title, salary, benefits.
- Determine whether the cost of insurance, stipend, housing, etc. will be paid for by the exchange visitor or the faculty host – and if paid by U-M, how much
- Identify the ShortCode to be used for shipment of the DS-2019 (and who will ship – your unit or International Center?)
- Identify the exchange visitor's site(s) of activity (building and address). If known, please provide the site of activity code(s) when completing the eForm.
- If known, please provide the CIP code when completing the eForm (otherwise, SSC/International Center will determine the code).

Unit responsibilities during request processing

- Refer exchange visitors to the SSC for questions / instructions related to processes the SSC is handling on behalf of the unit. This includes questions pertaining to the processing of the DS-2019 and overall status of the J-1 visa request, etc.
- Communicate with the SSC **via CaseConnect** to maintain a record of the conversation
- Obtain faculty review and signature on the Department of State letter prepared by the SSC (and insert your unit logo)
- Upload required / requested documents via CaseConnect (not via email attachment)
- Notify the SSC should the intended dates of the program or funding change

Questions?

If you have questions, please contact Margaret Erickson (ericksom@umich.edu) or the SSC SMQ Team (ssc.operations.smq@umich.edu).