

# International Scholar Dossier (ISD) Manual for Department Administrators

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## Introduction

ISD is a web-based application that facilitates the transmission of electronic data from Harvard University international visiting scholars to the Harvard International Office (HIO). This system replaces the paper Preliminary Data Sheets that the HIO used to receive from international scholars and Harvard administrators to process immigration forms necessary to obtain a U.S. visa.

This system can be used only for international scholars coming to Harvard for the first time.

ISD allows the international scholar to submit electronically preliminary information to the department administrator. After the administrator reviews the data entered by the scholar and completes the departmental data, s/he sends it electronically to the HIO. The HIO then processes the application with the U.S. immigration authorities and sends the visa document to the scholar in his or her home country.

ISD allows for not only the transmission of data, but also the inclusion of attached documents in a variety of formats including MS-Word, PDF files, etc., eliminating the need for many paper documents.

We hope that this system will benefit you as a Harvard administrator. Please contact us if you have any questions or suggestions.

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# ISD Process Overview

*This covers the basic steps for using ISD to invite an international scholar to your department. ISD can be used for new visitors only. For repeat visitors, program extensions, or any other situation, please refer to the [Guide for Administrators](#) on the HIO web site or [contact your HIO advisor](#).*

**This overview is designed to get you started with ISD quickly. Each section of the manual will provide additional details.**

1. **Log in** to ISD with the user name and password provided in the email sent to you by Ricardo Maldonado. The URL for ISD Department Login is: <https://hioisdadmin.hio.harvard.edu> After logging in for the first time, click on “My Account” and change your password and security question to something that you will be able to remember.

## 2. **Add and Invite the scholar.**

Add a new scholar visitor. After the new record is created click on **Tasks** and **Invite Visitor**. This will allow you to compose an email which will be sent to the scholar along with login information. You should copy yourself on this email so that you can help the scholar if s/he has trouble logging in.

## 3. **Scholar logs in and inputs information.**

The scholar will log in using the information provided and will complete his data.

## 4. **Department completes data entry.**

After the scholar has entered his/her data, you will receive an email. You should now review the scholar’s information to make sure it is complete and enter the departmental information on each tab for the scholar.

## 5. **Attach documents and add notes.**

Any necessary documents (such as a FedEx air bill) should be attached to the record. If there is any information you would like to communicate to the HIO advisor, please enter this in the **Notes** tab, and indicate you have done so in the Appointments Tab.

## 6. **Submit to HIO.**

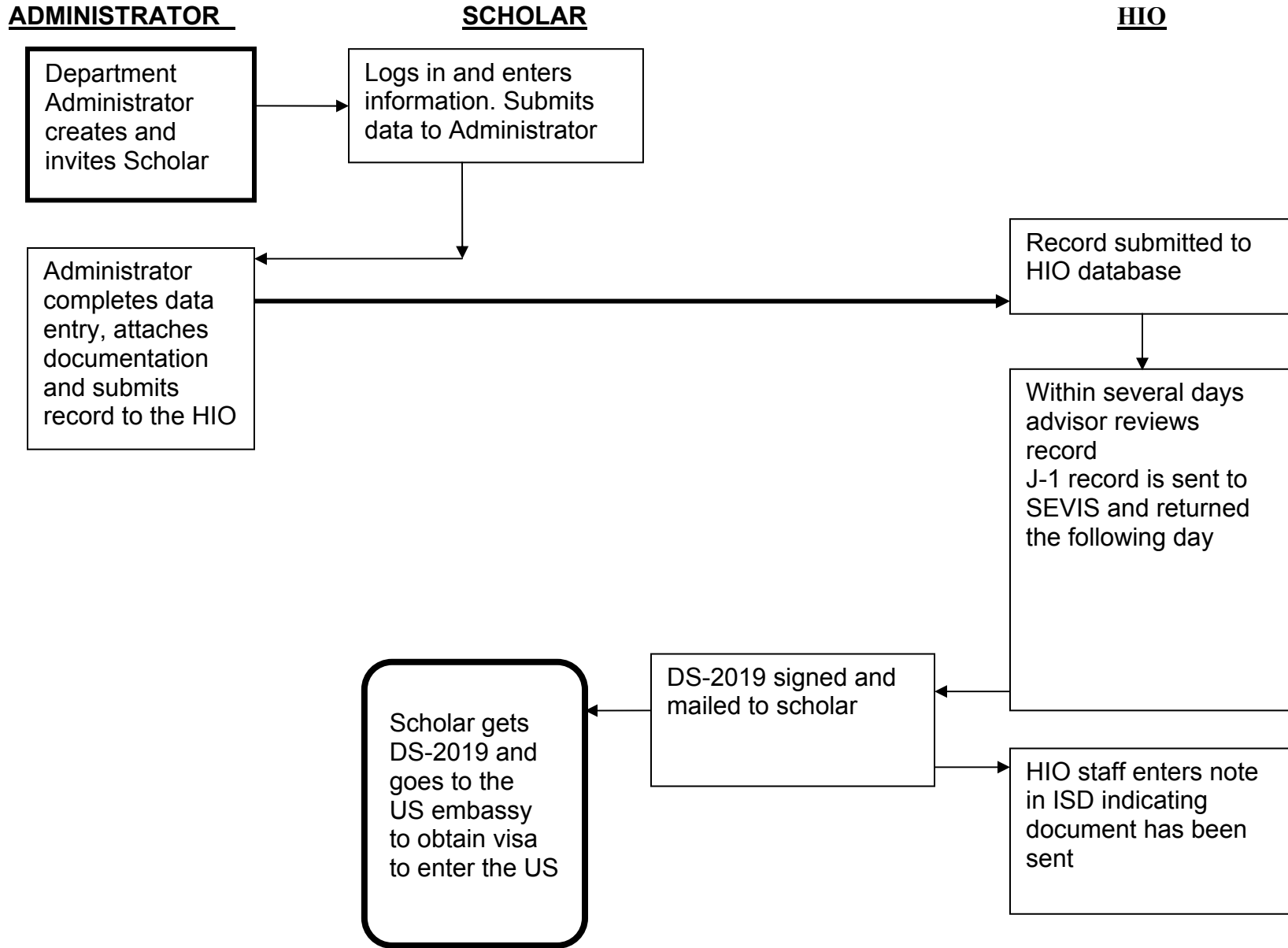
Click on **Tasks** and **Review and Submit Visitor’s Information**. Click the **Submit** button to send the record to the HIO.

## 7. **Receive confirmation that visa document was generated.**

Check for “visa document sent” note in **Notes** section. A note containing the appointment dates and SEVIS ID number will be entered by the HIO when a J-1 visa document has been sent.

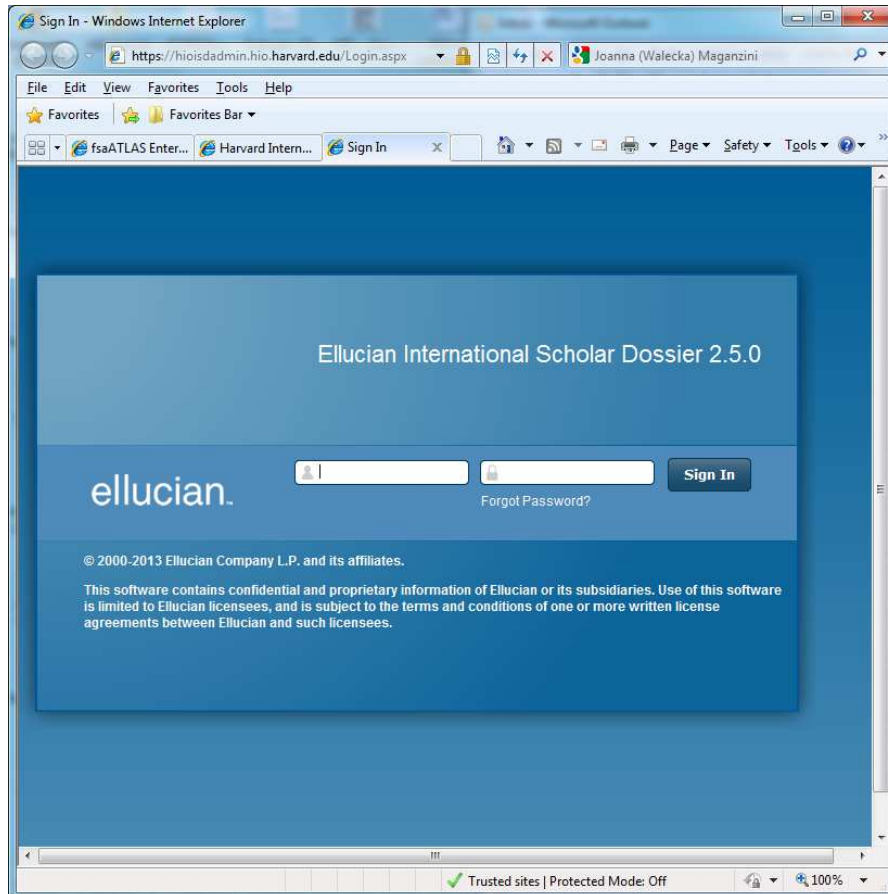
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# Process Flowchart



# ISD Instructions

## Logging in to ISD



Log in to ISD with the user name and password provided in the email sent to you by Ricardo Maldonado. The URL for ISD Department Login is:  
<https://hioisdadmin.hio.harvard.edu/>

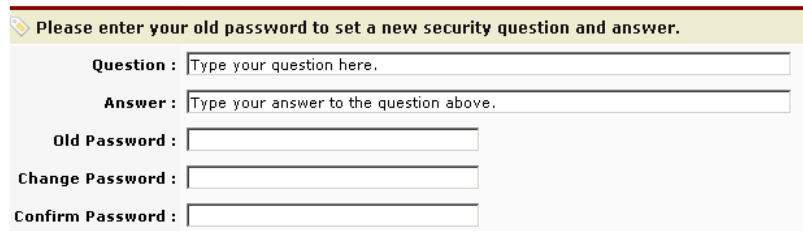
**Note: This web site is only for authorized departmental users. Please do not provide the above link to the international scholars. They will use a different one.**

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## Creating a Security Question

The first time that you log in to ISD it is very important that you change your password and the security question. The security question will allow you to get your password in case you forget it or get locked out of the system. Please use a question and answer that you will remember.

Go to “My Account” and complete the fields below

 Please enter your old password to set a new security question and answer.

**Question :**

**Answer :**

**Old Password :**

**Change Password :**

**Confirm Password :**

The Old Password is the original one sent to you by email. Your new password must be different from your old password.

**Remember to click “Save” to save the changes.**

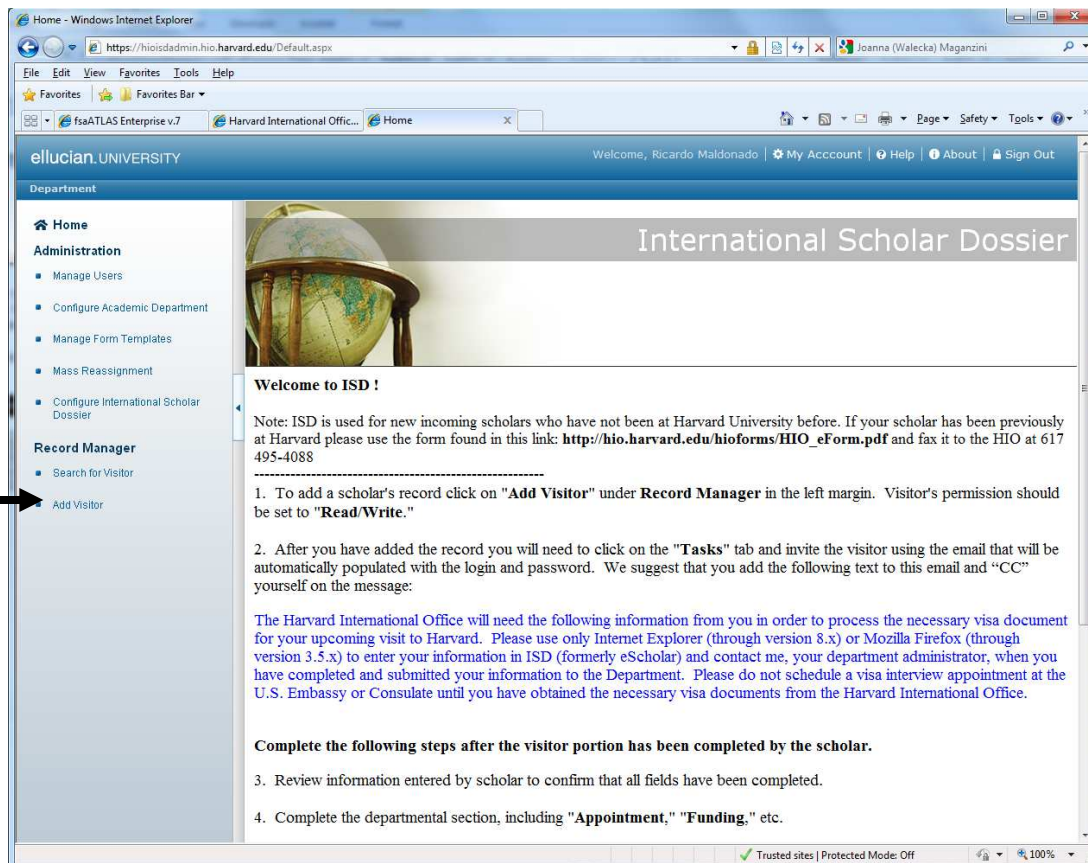
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## Adding a Visitor

Once you have successfully logged into ISD, you will be directed to a Welcome Page that has a summary of the steps you will be completing. This document contains additional information to assist you.

On the left side of the screen under Record Manager, click Add Visitor.

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The screenshot shows a web browser window displaying the Harvard International Office (HIO) website. The browser's address bar shows the URL <https://hioisdadmin.hio.harvard.edu/Default.aspx>. The website header includes the text "ellucian UNIVERSITY" and "Welcome, Ricardo Maldonado". A navigation menu on the left side is titled "Department" and contains several sections: "Home", "Administration" (with sub-items: Manage Users, Configure Academic Department, Manage Form Templates, Mass Reassignment, Configure International Scholar Dossier), and "Record Manager" (with sub-items: Search for Visitor, Add Visitor). A black arrow points to the "Add Visitor" link. The main content area features a banner with a globe and the text "International Scholar Dossier". Below the banner, there is a "Welcome to ISD !" section with a note and a list of instructions. The instructions are: 1. To add a scholar's record click on "Add Visitor" under Record Manager in the left margin. Visitor's permission should be set to "Read/Write." 2. After you have added the record you will need to click on the "Tasks" tab and invite the visitor using the email that will be automatically populated with the login and password. We suggest that you add the following text to this email and "CC" yourself on the message: The Harvard International Office will need the following information from you in order to process the necessary visa document for your upcoming visit to Harvard. Please use only Internet Explorer (through version 8.x) or Mozilla Firefox (through version 3.5.x) to enter your information in ISD (formerly eScholar) and 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 the U.S. Embassy or Consulate until you have obtained the necessary visa documents from the Harvard International Office. Below this, there is a section titled "Complete the following steps after the visitor portion has been completed by the scholar." with instructions: 3. Review information entered by scholar to confirm that all fields have been completed. 4. Complete the departmental section, including "Appointment," "Funding," etc.



## Creating a new record

The screenshot shows a web browser window titled "Manage Visitor - Windows Internet Explorer" with the URL "https://hioisdadmin.hio.harvard.edu/ManageVisitor.aspx?flag=Add". The page header includes "ellucian UNIVERSITY" and a welcome message for Ricardo Maldonado. The left sidebar contains a "Department" menu with options like "Home", "Administration", and "Record Manager". The "Add Visitor" link is highlighted in the "Record Manager" section. The main content area is titled "Add Visitor" and contains the following sections:

- Basic Information:** Includes fields for Last Name, First Name, Middle Name, Campus ID, Campus, Academic Department, Department User, and ISSO Advisor. A note says "Please fill the basic visitor information below." Red dots indicate required fields.
- Login Information:** Includes fields for User Name and Email. A note says "The Visitor's email address is required prior to inviting the visitor to visit your International Scholar Dossier website and personal information. A password is automatically created and sent to the visitor when the invitation is sent."
- Visitor Permissions:** Includes radio buttons for Read/Write (selected), View, and None. A note says "Below are the different permission levels available for visitor."

Buttons for "Save", "Cancel", and "Reset" are located at the top and bottom of the form.

Input incoming scholar's information. Fields marked with a red dot are required. Campus ID field should be left blank. Campus should be "Harvard University," 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. Please choose something that is easy to remember. We suggest using a **one word** combination of the first and last names if possible (for example: JSmith or JSmith2 ). Try to avoid using the whole name as a login name for the scholar.

Please remember to check that the scholar's Email Address field is correct. The address entered in this field will be the destination of an automatic message containing a password that will allow the incoming scholar to access ISD.

Select "Read/Write" for the Scholar's Permission. This allows the scholar to edit personal information in ISD.

Click Save.

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## Duplicated records

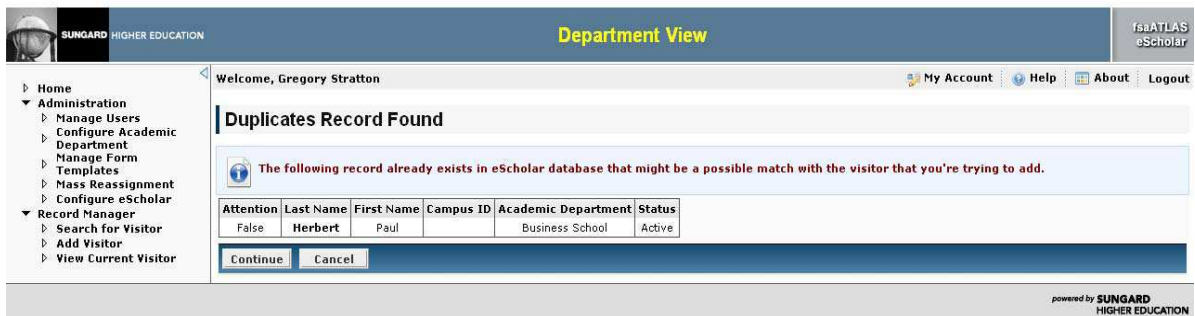
ISD will now check if there is a record in the HIO database with the same name that you have entered. A record may exist if the scholar has been at Harvard before, or if s/he is currently affiliated with another department, school, or hospital at Harvard.

### What to do:

If a record appears as duplicated to the system, you will be brought to a screen that reads “Duplicates Record Found.” (see graphic below). If this happens, please contact your [HIO Advisor](#) to determine whether the duplicate record is for the same person you are trying to add. This would be the case if the visitor was previously under Harvard’s visa sponsorship.

If the HIO confirms that a record for the person you are inviting already exists in its database, you should use the HIO [eForm](#) available for download from the HIO web site instead of using ISD. Click **Cancel** to prevent a new record from being created in ISD.

If your HIO advisor confirms that this is a new visitor, you must proceed by clicking **Continue**.



The screenshot shows the SUNGARD Higher Education Department View interface. The page title is "Department View" and the user is logged in as "fseATLAS eScholar". The user is identified as "Gregory Stratton". The main content area displays a message: "Duplicates Record Found". Below the message, a table lists a record that already exists in the eScholar database:

Attention	Last Name	First Name	Campus ID	Academic Department	Status
False	Herbert	Paul		Business School	Active

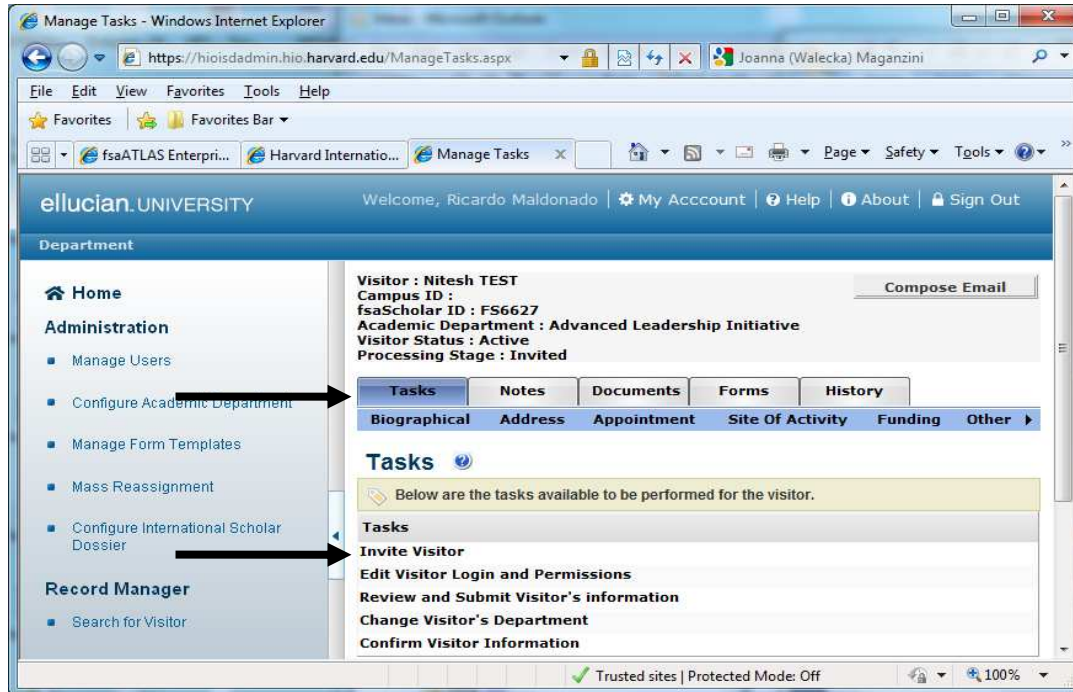
At the bottom of the message area, there are two buttons: "Continue" and "Cancel".

Also, you will get a message about a duplicated record if the user name of your scholar is the same as someone else’s username in the system. You could change the user name (go to Tasks > Edit Visitor Login and Permissions) and that should fix the problem. Adding an extra letter or number to the user name will also solve the problem.

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## Inviting a Visitor

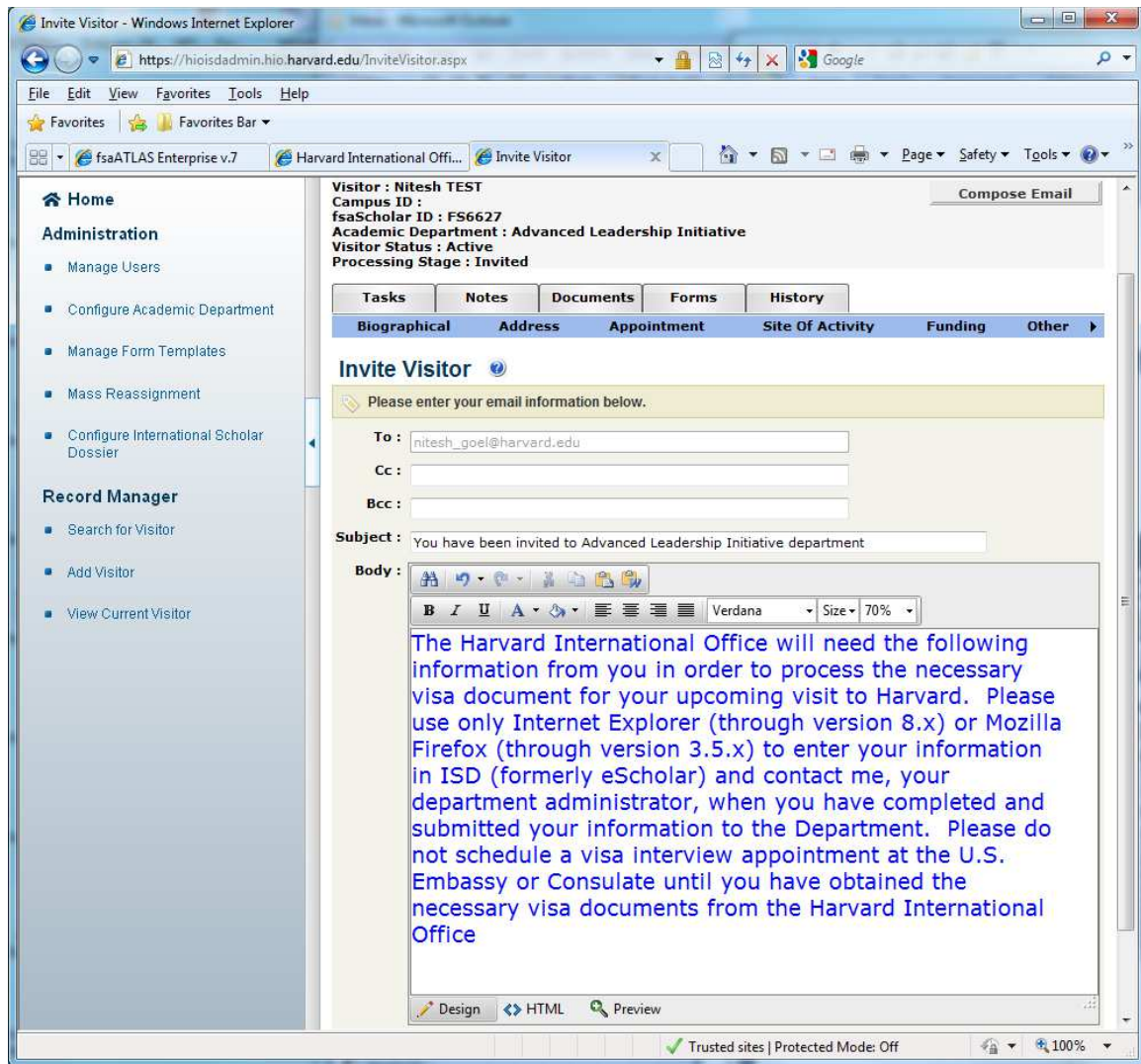
After you have added the record you will need to click on the Tasks tab and click “Invite Visitor.” The invitation process will generate an email that will be automatically populated with the login and password.



Here is the sample wording to send to a scholar:

*The Harvard International Office will need the following information from you in order to process the necessary visa document for your upcoming visit to Harvard. Please use only Internet Explorer (through version 8.x) or Mozilla Firefox (through version 3.5.x) to enter your information in ISD and 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 the Harvard International Office.*

Feel free to add any additional information that will be important or helpful to the incoming scholar. We suggest putting your own email address in the “Cc:” field.



Click **Send**. This will send an email message to the scholar. The e-mail message will have two parts:

The first part will include everything you typed in the body of the message (see above). The second part, added automatically by the system, will contain the login, password and the URL to the scholar section of ISD. Please note that the URL for the scholar is different from the one used by you.

At this point, you have completed steps 1 and 2 on the Welcome Page and can log out of the system unless you have additional scholars to invite. The scholar will now use the information from the email you sent to log in and complete his or her part of the process.

**Note: Please do not use the “Compose Email” icon in the upper right part of the screen.**

The scholar will receive an email message similar to the one below:

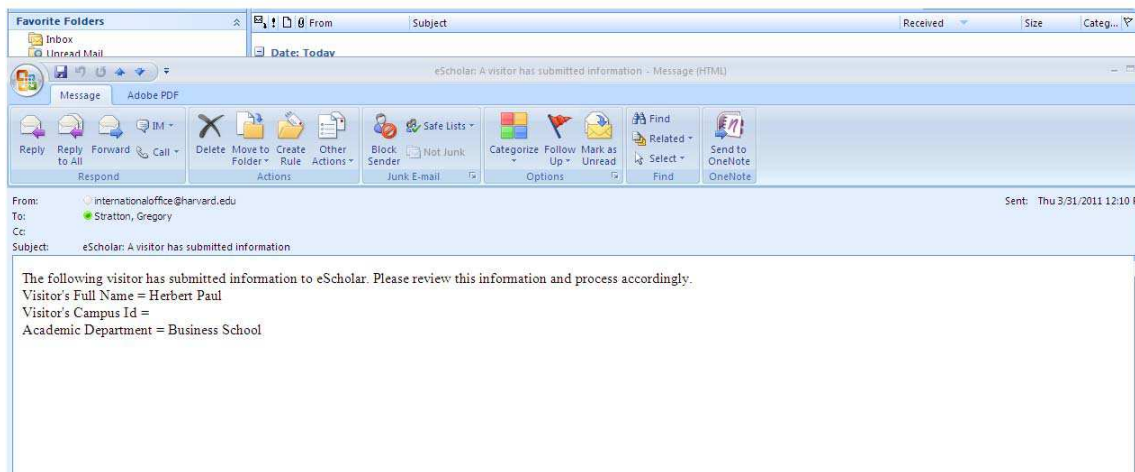


This will complete the invitation process. Your scholar should be ready to enter his/her own information.

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## Departmental Process to complete and submit information (Overview)

After the scholar has submitted his or her information to the Department you will receive an automatic message similar to the one below.



This e-mail indicates that the scholar has completed the data entry. It is your turn now to complete the data. You will now need to do the following:

- Review information entered by the scholar to confirm that all fields have been completed.
- Complete the departmental sections:
  - **Appointment**
  - **Site of Activity**
  - **Funding** (scholar might have already entered some funding information)
- If you indicate that you want the visa document mailed to the scholar via FedEx, you must attach an electronic FedEx air bill in the “**Documents**” tab.
- In order to submit the scholar's and the departmental information to the HIO, go to the “**Tasks**” tab and click on “**Review and Submit Visitor's Information**” link.

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## Search for Visitor

Log in to ISD and on the left side of the screen under Record Manager, select Search for Visitor.

The screenshot shows a web browser window titled "Invite Visitor - Windows Internet Explorer". The address bar displays the URL: <https://hioisdadmin.hio.harvard.edu/InviteVisitor.aspx>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites Bar shows "fsaATLAS Enterprise v.7", "Harvard International Offi...", and "Invite Visitor".

The main content area is divided into two sections. On the left is a navigation sidebar with the following items:

- Home
- Administration
  - Manage Users
  - Configure Academic Department
  - Manage Form Templates
  - Mass Reassignment
  - Configure International Scholar Dossier
- Record Manager**
  - Search for Visitor** (highlighted with a black arrow)
  - Add Visitor
  - View Current Visitor

The right section displays visitor information for "Nitesh TEST":

- Visitor : Nitesh TEST
- Campus ID : FS6627
- fsaScholar ID : FS6627
- Academic Department : Advanced Leadership Initiative
- Visitor Status : Active
- Processing Stage : Invited

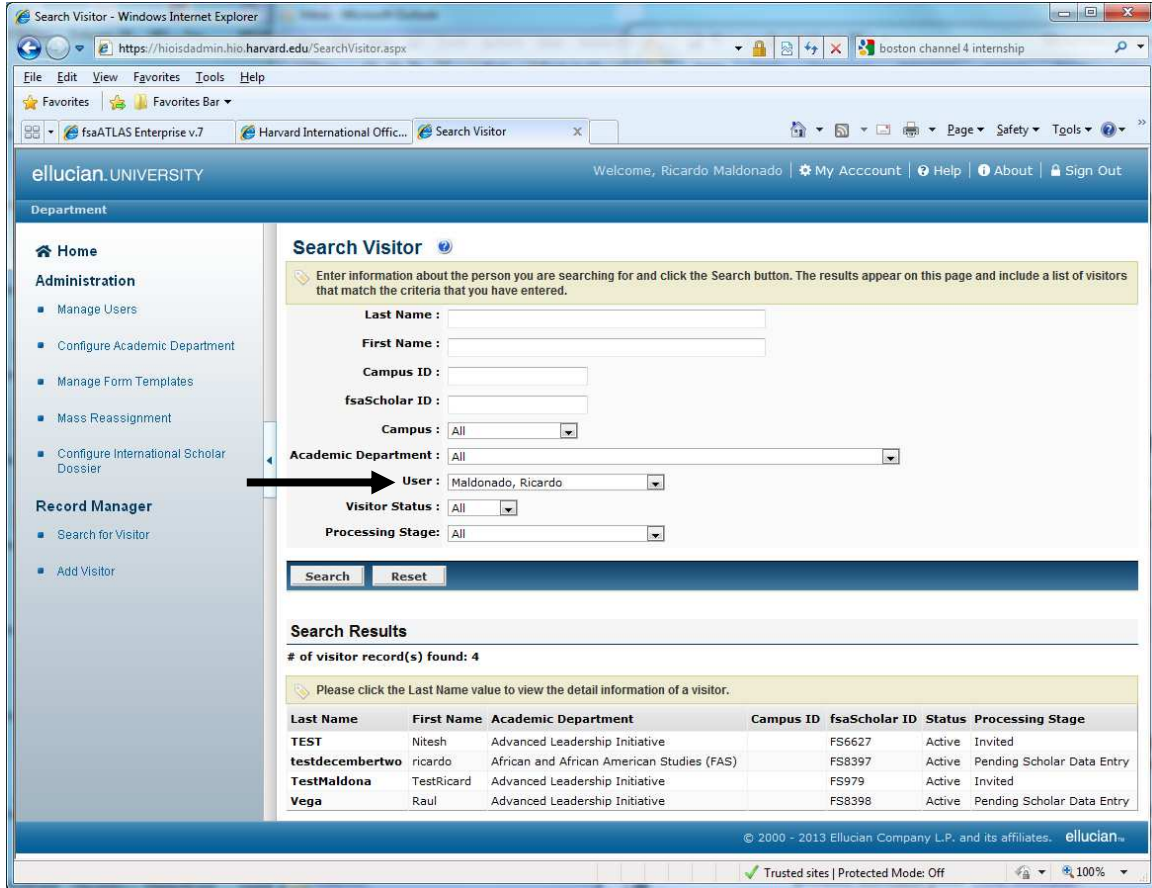
Below this information are tabs for "Tasks", "Notes", "Documents", "Forms", and "History". A secondary set of tabs includes "Biographical", "Address", "Appointment", "Site Of Activity", "Funding", and "Other".

The main content area is titled "Invite Visitor" and contains an email composition form. The form includes fields for "To:", "Cc:", and "Bcc:". The "To:" field contains the email address "nitesh\_goel@harvard.edu". The "Subject:" field contains the text "You have been invited to Advanced Leadership Initiative department". The "Body:" field contains the following text:

The Harvard International Office will need the following information from you in order to process the necessary visa document for your upcoming visit to Harvard. Please use only Internet Explorer (through version 8.x) or Mozilla Firefox (through version 3.5.x) to enter your information in ISD (formerly eScholar) and 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 the U.S. Embassy or Consulate until you have obtained the necessary visa documents from the Harvard International Office

The bottom of the browser window shows the status bar with "Trusted sites | Protected Mode: Off" and a zoom level of "100%".

Search by Last Name and under Search Results, click on scholar's last name.



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.

First, review the Biographical and Address tabs that should have been completed by the scholar for any missing information. Please do not make any changes to the biographical information entered by the scholar. If changes are necessary, please contact your [HIO advisor](#).

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## Appointment Tab

Click on Appointment tab and fill in relevant information. Please note that because ISD is an internal database, FAS Departments should use the “GSAS” selection for the “School Name” field.

**NOTE: Administrators entering data for J-1 Student Interns, must choose Student Intern from the "Harvard Appointment Title" pull-down menu.**

The screenshot shows a web browser window titled "Add or Edit Appointment - Windows Internet Explorer". The address bar shows the URL: <https://hioisadmin.hio.harvard.edu/VisitorDataViews.aspx?CategoryName=Appointment&IsEditMode=true>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page content is organized into tabs: Tasks, Notes, Documents, Forms, and History. Below these are sub-tabs: Biographical, Address, Appointment, Site Of Activity, Funding, and Other. The main content area is titled "Appointment Information" and contains a "Save" and "Reset" button. A yellow warning box states: "The following information is to be entered by the department administrator. If there is any element of patient care involved, faculty sponsor should contact the HIO immediately. Note: Administrators entering data for Student Interns, please choose 'Student Intern' from the 'Harvard Appointment Title' pull-down menu." The form fields include: School Name (dropdown), Appointment Start Date (calendar), Appointment End Date (calendar), Harvard Appointment Title (dropdown), Hospital Title (text), Will this appointment be less than 6 months? (checkbox), Is it possible that the appointment will be renewed or extended? (checkbox), Select "Research Scholar" unless visitor is a Student Intern (checkbox), Subject field code (as per HIO instructions) (text), and Fill in your school affiliation and department in this format: "FAS:Economics" (text). A sidebar on the left contains navigation links like "Record Manager" and "Add Visitor". Two black arrows point from the left towards the "Subject field code" field.

The Subject Field Code should match the code sent to you with your user name and password when your ISD account was first created and sent to you in the email from Ricardo Maldonado.

If you have misplaced this code, please contact your [HIO Advisor](#).

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Below Appointment Data there are Custom Fields that must also be completed.

**NOTE: For administrators with incoming J-1 Student Interns ONLY:**

Confirm the English language statement ( see screen below). Administrators with incoming J-1 Student Interns also must complete Form DS-7002, save it and attach it to the Student Intern's record using the "Documents" tab above (links to the form below).

Sample Form DS-7002 =

<http://www.hio.harvard.edu/hioforms/HIO - Sample Form DS-7002.pdf>

Blank form DS-7002 =

<http://www.hio.harvard.edu/hioforms/HIO - Form DS-7002.pdf>

Under the field "Have you attached any documents for your scholar," select "Yes" if you plan to upload a document, such as a FedEx air bill or previous visa documents. The HIO advisor will not check for attached documents unless "Yes" is selected.

Custom Appointment Information

00 Are English language skills sufficient

01 Contact Faculty Full Name

02 Contact Admin Full Name

03 College School

04 Advisor

05 Department Program

06 Contact Admin Address Line 1

07 Contact Admin Address Line 2

08 Contact Admin City

09 Contact Admin State

10 Contact Admin Zip

11 Contact Admin Email

12 Contact Admin Phone

13 Contact Admin Fax

Have you attached any documents for your Scholar

Have you completed any notes in the Notes Tab

Hospital

Mailing Instructions

When all information is filled, click Save.

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## Site of Activity Tab

Click on the Site of Activity tab.

Click Add New and in the Pre-fill Site of Activity field, select your school, department, or hospital. You may then need to fill in additional information to complete the required address fields.

The screenshot shows a web browser window displaying the 'Add or Edit Site Of Activity' page on the ellucian.UNIVERSITY website. The page is titled 'Add or Edit Site Of Activity - Windows Internet Explorer' and the URL is 'https://hioisdadmin.hio.harvard.edu/VisitorData/Views.aspx?CategoryName=SiteOfActivity&EditMode=False&IsEmptyGrid=True'. The page header includes 'ellucian.UNIVERSITY' and 'Welcome, Ricardo Maldonado | My Account | Help | About | Sign Out'. The left sidebar contains navigation links for 'Home', 'Administration', and 'Record Manager'. The main content area shows 'Visitor: Nitesh TEST' and 'Campus ID: F56627'. Below this, there are tabs for 'Tasks', 'Notes', 'Documents', 'Forms', and 'History'. The 'Site Of Activity' tab is selected, showing 'Site Of Activity Information' and 'Site Of Activity Fields Data'. The form fields include 'Prefill Site of Activity' (Harvard University - Arboretum), 'Primary Site' (Yes), 'Site Name' (Harvard University - Arboretum), 'Site Address Line 1 (School or Dept)' (Arnold Arboretum), 'City' (Jamaica Plain), 'State' (MA), 'Postal Code' (02130), 'Zip Routing Code', and 'Preferred Name'. An arrow points to the 'Site Address Line 1' field.

Two examples of appropriate Site of Activity format are below:

The Site of Activity Name should generally be Harvard University and the school or hospital. If the Department is located at multiple sites on campus, it is not necessary to give specific building or room information. If the scholar will not be working on the Harvard campus (for example, at the FermiLab in Chicago, IL), enter the address where the scholar will be working.

For HMS and FAS, the department must be added in Address Line 1, and the department's street address on Address Line 2.

Site of Activity Name: Harvard University -FAS

Site Address line 1: Department of Chemistry and Chemical Biology (Input the academic department or hospital and do not use acronyms, abbreviations or ampersands)

Site Address line 2: 12 Oxford Street

City: Cambridge

State: MA

Zip Code: 02138

Site of Activity Name: Harvard University - **BIDMC**

Site Address line 1: Beth Israel Deaconess Medical Center (Input the academic department or hospital and do not use acronyms, abbreviations or ampersands)

Site Address line 2: 330 Brookline Avenue

City: Boston

State: MA

Zip Code: 02215

Click Save

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## Funding Tab

Academic Department : Advanced Leadership Initiative  
Visitor Status : Active  
Processing Stage : Invited

Tasks Notes Documents Forms History

Biographical Address Appointment Site Of Activity Funding Other

Save Reset

Funding Information

Funding Fields Data

**The department must complete the funding section if funding is from Harvard or an affiliated hospital.**

If the funding is coming from an affiliated hospital, please enter the information on the "Other Organization Funds" line as specified below.

When filling in the Other Funds field, list various funding source(s) and amount(s) in the description box in the following format: University of Berlin (8500), Stockholm School of Economics (5000). The sum of these amounts (13500) should be listed in the Other Funds field.

Note: Harvard funding fields are accessible only to Department Administrators

**The scholar must complete funding from all other sources, as appropriate.**

**All funding must be guaranteed.** All dollar amounts must be entered without commas and periods, and should be rounded to the nearest whole dollar (for example, \$15,459.87 should be entered as 15460).

Provide funding information for the total period of the affiliation at Harvard. For example, for a two-year appointment the financial information must cover a 24 month period.

All funding must be guaranteed. **All dollar amounts must be entered without commas or periods, and should be rounded to the nearest whole dollar** (for example, \$15,459.87 should be entered as 15460).

Provide funding information for the total period of the affiliation at Harvard. For example, for a two-year appointment the financial information must cover a 24 month period.

The department must complete the funding section if funding is from Harvard or an affiliated hospital. For Harvard funds, the description should read "Harvard University." If the funding is coming from an affiliated hospital, please enter the information on the "Other Organization Funds" line as specified below.

The scholar must complete funding from all other sources, as appropriate. When filling in the Other Funds field, list funding source and amount in the description box. If there are multiple sources, please list them in the description box using the following format:

University of Berlin (8500), Stockholm School of Economics (5000). The sum of these amounts (13500) should be listed in the Other Funds field. Click Save.

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## Attaching Documents

Click on Documents tab and attach as many documents as needed. The following are acceptable file formats:

- Bitmaps (\*.BMP)
- Microsoft Word documents (\*.DOC)
- Compuserve Graphics Image Files (\*.GIF)
- JPEG files (\*.JPG)
- Adobe Acrobat files (\*.PDF)
- Text files (\*.TXT)
- Excel spreadsheets (\*.XLS)
- Zipped files (\*.ZIP)

If there is any additional information you would like to include about this scholar to the advisor for your department in the HIO, click on the “**Notes**” tab and fill in notes as desired.

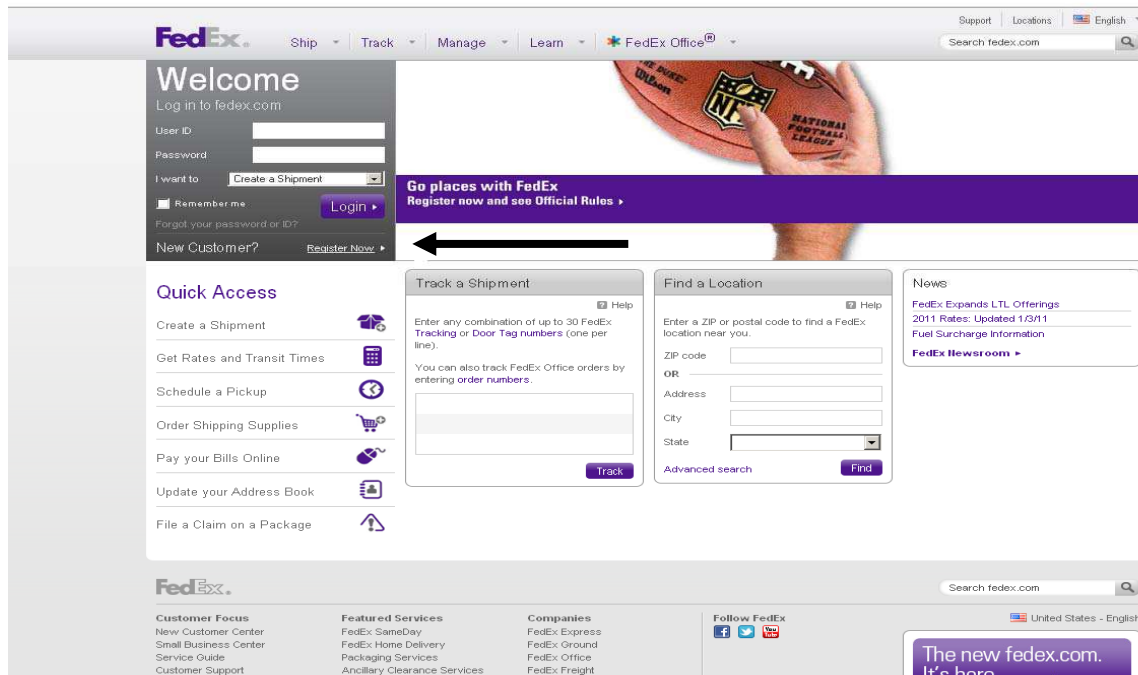
If you wish to have documents sent by FedEx, please make sure that you have attached an electronic FedEx air bill to the “**Documents**” tab as described in the next section and that you have indicated FedEx mailing instructions in the “**Appointment**” tab.

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## Federal Express (FedEx) Air bills

To create an electronic air bill, you must create a login with [fedex.com](http://fedex.com) using your FedEx account Number. Instructions for creating the account:

- Go to [fedex.com/us](http://fedex.com/us)
- On the left hand side, click on “Register Now.”



The screenshot shows the FedEx.com homepage. At the top, there is a navigation bar with links for Ship, Track, Manage, Learn, and FedEx Office. A search bar is located in the top right corner. The main content area is divided into several sections:

- Welcome:** A login section on the left with fields for User ID and Password, a "Remember me" checkbox, and a "Login" button. Below this is a "New Customer?" link with a "Register Now" button.
- Go places with FedEx:** A purple banner with the text "Register now and see Official Rules" and a right-pointing arrow.
- Quick Access:** A vertical list of service links on the left, including "Create a Shipment", "Get Rates and Transit Times", "Schedule a Pickup", "Order Shipping Supplies", "Pay your Bills Online", "Update your Address Book", and "File a Claim on a Package".
- Track a Shipment:** A form on the right with a "Track" button.
- Find a Location:** A form on the right with fields for ZIP code, Address, City, and State, and a "Find" button.
- News:** A section on the right with links to "FedEx Expands LTL Offerings", "2011 Rates: Updated 1/3/11", and "Fuel Surcharge Information".

At the bottom of the page, there is a footer with sections for Customer Focus, Featured Services, Companies, and Follow FedEx. A search bar is also present in the footer.

- Select “Use my account online” to create a user name and password to use fedex.com with your FedEx account.

**FedEx.** Ship Track Manage Learn FedEx Office<sup>SM</sup> Support Locations English Search fedex.com

**Ship smarter**  
Register on fedex.com

- Open a FedEx account
- Use my account online
- Get a user ID only

**Choose FedEx and save up to 16%** Go

### Choose the account option that meets your needs

**If you ship regularly**

Make managing your shipping as fast and easy as possible. Open a FedEx account online, and take advantage of FedEx Ship Manager<sup>SM</sup> at fedex.com. If you already have a fedex.com user id, log in and apply for a new account.

**Open a FedEx account**

**Advantages**

- Save time and ship smarter with tools like Address Book, Ship History and **much more**.
- Save up to 16% on eligible FedEx Express<sup>SM</sup> U.S. and international services.
- Save up to 8% on eligible FedEx Ground<sup>SM</sup> and FedEx Home Delivery<sup>SM</sup> services.

I understand that my use of the discount will be governed by the [Program Agreement](#)

**If you already have a FedEx account**

If you've never created shipping labels and managed shipments online, you're in for some real benefits. Just create a user name and password for online access to your FedEx account.

**Use my account online**

**Advantages**

- Use an address book to auto-fill shipping labels.
- View your entire shipping history.
- Generate detailed customized reports and **much more**.
- Keep your existing discounts or **add new discounts**.

**If you ship rarely**

You are not required to have a FedEx account number to create shipping labels online. However, please note that you will have to enter and authorize your credit card number for every shipment. [Learn more](#).

Valid for single-piece shipments within the U.S. only.

**Get a user ID only**

**Advantages**

- Use an address book to auto-fill shipping labels.
- View your entire shipping history.

- Fill in the appropriate information.



- Once complete, this will bring you to a final confirmation screen. Click on the orange arrow next to where it reads “Start using My FedEx”
- Next you will need to supply your FedEx account number.

Now that your FedEx login is set up, you are ready to create an air bill. You will then print this to a .PDF file to attach to your scholar’s ISD record.

- Click on **Prepare Shipment**.
- Enter your FedEx account number. Then click the continue button. After doing this, you may see this screen again. If so, re-enter the account number and then click **Continue**.
- From here, whenever you want to create an air bill, you’ll need to go to click on **Prepare Shipment**. It will bring you to the following screen:

FedEx Ship Manager<sup>®</sup> [Logout](#) [Help](#)

Prepare Shipment | Ship History | My Lists | Reports | My Profile

### Create a Shipment

1 Enter shipping information 2 Print label(s)

\* Denotes required field. [Preferences](#) | [Clear all fields](#)

#### My Shipment Profiles

My shipment profiles (formerly Fast Ship)  [Help](#) [Hide](#)

[Ship](#)

---

#### 1. From

[Help](#) [Hide](#)

Saved senders

\* Country/Location: United States

Company:

\* Contact name:

\* Address 1:

Address 2:

\* City:

\* State:

\* ZIP:

\* Phone no.:  ext.

Save as my default address.

Save new sender in address book.

---

#### 2. To

[Help](#) [Hide](#)

\* Country/Location:

Company:

\* Contact name:

\* Address 1:

#### 4. Billing Details

[Help](#) [Hide](#)

\* Bill transportation to:

Your reference:

[More reference fields](#)

---

#### Special Services (optional)

[Help](#) [Edit](#)

Select additional services for your shipment.

---

#### Pickup/Drop-off (optional)

[Help](#) [Edit](#)

You are dropping off your package at a FedEx location.

---

#### E-mail Notifications (optional)

[Help](#) [Edit](#)

Send an e-mail to yourself, the recipient or others indicating the status of your shipment.

---

#### Rates & Transit Times (optional)

[Help](#) [Hide](#)

Amounts are shown in USD

Select	Service and Transit Time	Your Rate
	Click calculate to get rates and transit times.	<a href="#">Calculate</a>

---

#### 5. Complete your Shipment

[Help](#)

Create a Shipment Profile to store recipient, package and all other details of this shipment for future use.

[Save for later](#) [Ship](#)

**Please note that FedEx will not ship to P.O. Boxes.**

- Fill in required information. Enter \$1 for value, and use the current date.
- Select the service type you prefer. Please note that rates for different service types vary greatly, so be sure to choose carefully. “Standard” or “Economy” shipments are usually good choices, except in very time-sensitive cases.
- Click **Ship**.
- Confirm shipping details and then click **Ship** again.

**Confirm your shipment details**

**Outbound Shipment** [Help](#)

<b>From</b>	Department Administrator's Name Harvard International Office Holyoke Center, Room 864 1350 Massachusetts Avenue Cambridge, MA United States 02138 617-495-2789	<b>Ship date</b>	02/09/2011
		<b>Service type</b>	Standard Overnight
		<b>Package type</b>	FedEx Envelope
		<b>Number of packages</b>	1.0
		<b>Total weight</b>	0.50 lbs
		<b>Dimensions</b>	
		<b>Declared value</b>	0.0 USD
		<b>Bill transportation to</b>	HIO-883
		<b>Your reference</b>	
<b>To</b>	Scholar's Name Scholar's Address Cambridge, MA United States 02138 617-495-2789	<b>Pickup/Drop-off</b>	Drop off package at FedEx location ←
		<b>P.O. no.</b>	
		<b>Invoice no.</b>	
		<b>Department no.</b>	
		<b>Special Services</b>	

[Edit](#) [Ship](#)




**If you get an email indicating that the package will be picked up the same day do the following:**

Go to the "Prepare Shipment" screen of the FedEx web site under Section 4 (Billing Details). Where it reads "Pickup/Drop-off," you can click "+Edit" and select the option to "Drop off package at a FedEx location"

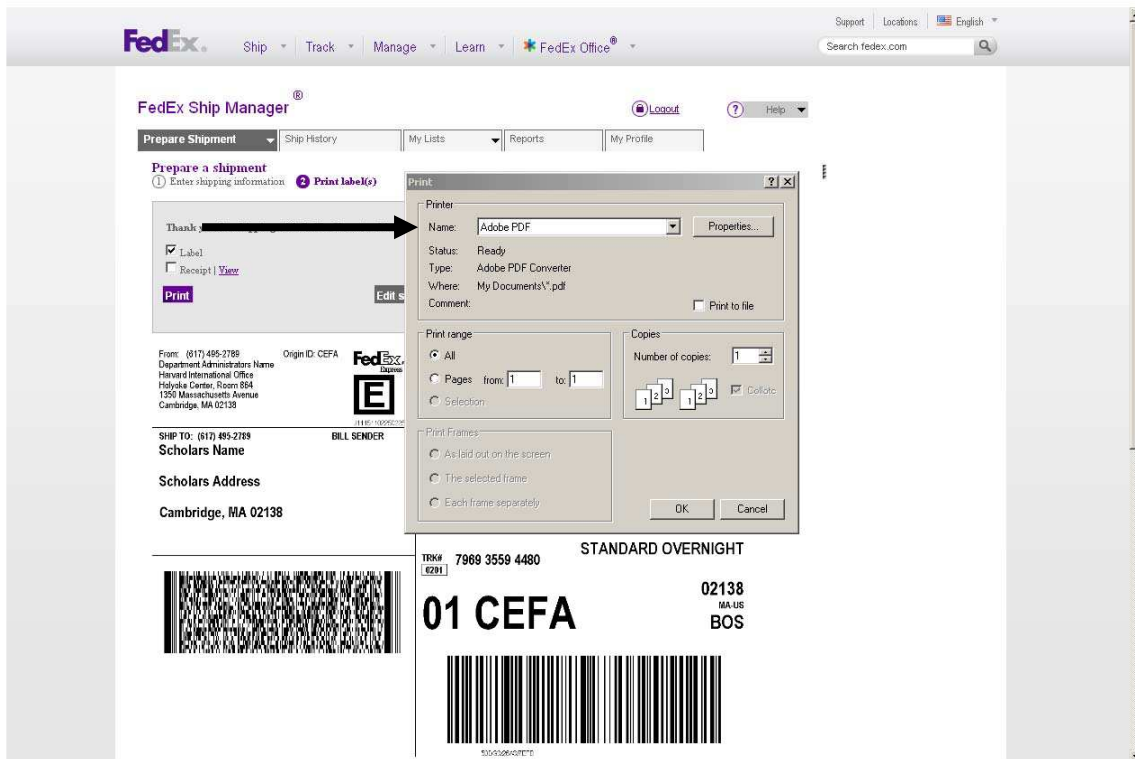
- Once on the screen with the FedEx air bill, click **Print** button. You will print the air bill to a .PDF file.

The screenshot displays the FedEx Ship Manager interface. At the top, there are navigation links for 'Ship', 'Track', 'Manage', 'Learn', and 'FedEx Office'. A search bar is located in the top right corner. The main heading is 'FedEx Ship Manager' with a 'Logout' button and a 'Help' dropdown. Below this, there are tabs for 'Prepare Shipment', 'Ship History', 'My Lists', 'Reports', and 'My Profile'. The 'Prepare a shipment' section includes a sub-heading 'Prepare a shipment' and two options: 'Enter shipping information' and 'Print label(s)'. A message states: 'Thank you for shipping with FedEx. Your tracking number: 796935594480'. There are checkboxes for 'Label' (checked) and 'Receipt | View'. A 'Print' button is highlighted with a black arrow. Below the 'Print' button are several action buttons: 'Edit shipment', 'Cancel shipment', 'Repeat last', 'Create New', and 'Schedule a Pickup'.

The shipping label details are as follows:

<p>From: (617) 495-2789          Department Administrator Name          Harvard International Office          Holyoke Center, Room 854          130 Massachusetts Avenue          Cambridge, MA 02138</p>	<p>Origin ID: CEFA</p>	<p><b>FedEx</b>  <small>Express</small></p>	<p>Ship Date: 31MAR11          ActWgt: 0.5 LB          CAD: 7700761/NET3130</p>
<p>SHIP TO: (617) 495-2789  <b>Scholars Name</b>          Scholars Address          Cambridge, MA 02138</p>	<p>BILL SENDER</p>	<p>Delivery Address Bar Code</p> 	<p>Ref #          Invoice #          PO #          Dept #</p>
	<p>TRK# 7969 3559 4480          E291</p>	<p>FRI - 01 APR A1          STANDARD OVERNIGHT</p>	<p>02138          MA-US          BOS</p>
	<p><b>01 CEFA</b></p>		

- Print to a .PDF file (under the printer selection, choose “Adobe PDF”). Save this file to your desktop and then upload it to the Documents tab.



*Please note: If you select FedEx for Mailing Instructions and do not attach an air bill to the record, the documents will be sent by Regular Air Mail Delivery. We suggest noting the FedEx tracking number or saving a PDF copy of the air bill so that you may track the package in the future or inform the scholar.*

If you are having trouble with the FedEx web site, you can refer to their online help section by clicking the "Help" button in the FedEx Ship Manager, or by calling the FedEx Customer Service Department at 1.800.GoFedEx.

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## Review and Submit Process

- Click on Tasks
- Click Review and Submit Scholar Information, and if all information is correct, click on Submit button. This will send the information to the HIO for processing.

The screenshot shows a web browser window titled "Manage Tasks - Windows Internet Explorer" with the URL <https://hioisdadmin.hio.harvard.edu/ManageTasks.aspx>. The page header includes the ellucian.UNIVERSITY logo and a welcome message for Ricardo Maldonado, along with links for My Account, Help, About, and Sign Out.

The main content area is titled "Department" and features a navigation menu on the left with sections for "Home", "Administration" (including Manage Users, Configure Academic Department, Manage Form Templates, Mass Reassignment, and Configure International Scholar Dossier), and "Record Manager" (including Search for Visitor, Add Visitor, and View Current Visitor).

The right-hand side of the page displays visitor information for "Nitesh TEST" (Campus ID: FS6627, Academic Department: Advanced Leadership Initiative, Visitor Status: Active, Processing Stage: Invited) and a "Compose Email" button. Below this is a tabbed interface with "Tasks" selected. The "Tasks" tab shows a list of available actions: "Invite Visitor", "Edit Visitor Login and Permissions", "Review and Submit Visitor's information" (highlighted with a black arrow), "Change Visitor's Department", and "Confirm Visitor Information".

At the bottom of the browser window, the status bar indicates "Trusted sites | Protected Mode: Off" and a zoom level of 100%.

- NOTE: Administrators reviewing data entered by J-1 Student Interns need to make sure that all the Custom Fields under the Education tab (Other>>Education) are completed before you submit the record to the HIO. See screen below:

**Custom Education Information**

**For J-1 Student Interns Only (Student Interns are visitors who are degree candidates in their home countries)**

Please fill in the information below.

Note: Do not use apostrophes. Use Masters instead of Master's or Bachelors instead of Bachelor's

Custom Fields Data

**Custom Education Information**

Degree sought at Home Institution

Estimated Completion Date of Current Program at Home Institution

Field of Study at Home Institution

Home Institution

I agree to comply with the J 1 visa health insurance requirement

Save Reset

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**After submitting a scholar's information, do not make any further changes to the record. Do not resubmit the record, as this would create a duplicate record. If you need to make changes after submission, please contact the advisor for your department in the HIO.**

Once visa documents have been processed, issued and sent to the scholar by the HIO, a **note will be added to the scholar's record informing you of the status and the scholar's SEVIS ID number.**

A typical note would be: *“Visa document sent 9/22/2010 by Air Mail for appointment from 4/1/11 - 5/31/11. SEVIS ID #N000000000”*. You may send this information to the scholar, in order to facilitate an appointment for a visa interview at a U.S. Embassy or Consulate.

The screenshot shows a web browser window displaying the ellucian UNIVERSITY portal. The user is logged in as Ricardo Maldonado. The page shows the 'Notes' tab for a visitor, with a table listing a note about a document sent on 10/22/2013.

Visitor Information:

- Visitor ID: [Redacted]
- Campus ID: [Redacted]
- fsaScholar ID: FS7922
- Academic Department: Partners
- Visitor Status: Active
- Processing Stage: Submitted to International Office

Navigation: Tasks, **Notes**, Documents, Forms, History

Sub-navigation: Biographical, **Address**, Appointment, Site Of Activity, Funding, Other

Notes Section:

**Add Note**

This tab contains all notes information for the visitor

Date Last Edited	Subject	Description	Last Edited By	Number of attached documents
10/25/2013	<b>Document issued</b>	Document sent 10/22/2013	Admin Admin	0

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## **Contact your HIO Advisor**

Once a record is complete and your HIO Advisor does not have additional questions, J-1 visa documents will be processed within 10 business days.

For a list of Frequently Asked Questions about ISD, please refer to the ISD FAQ on the HIO web site (or the ISD FAQ document sent to you).

If you have any non-technical questions about the information to submit in ISD, please contact your HIO Advisor directly:

### **Harvard International Office Advisors**

For the most current list of HIO advisors please go to:

<http://www.hio.harvard.edu/about/hio/contactus/contactyouradvisor/>

You can also find the advisors' telephone and email them here:

<http://www.hio.harvard.edu/about/hio/contactus/stafflist/>

If your advisor is not available the HIO has an advisor on call during business hours. Please visit the following page for more information:

<http://www.hio.harvard.edu/about/hio/advisoroncall/>

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## ISD Frequently Asked Questions (FAQ)

We have grouped the FAQ by similar subjects to facilitate your finding the right question.

- Data Entry Questions
- Procedural Questions
- System Access and Error Messages
- Other Questions

To go to each answer hold the Control key and Click on the question.

### [Data Entry Questions](#)

- [How do I complete and upload a FedEx air bill?](#)
- [When I complete the FedEx form and click ship - I get an email indicating that the package will be picked up the same day. I don't want it picked up here and it is not clear when it should be at HIO. What should I do?](#)
- [What should I enter for Site of Activity?](#)
- [What should I enter for Subject/Field Code?](#)

### [Procedural Questions](#)

- [What browser should I use?](#)
- [I tried to add a visitor and the system indicates that the record already exists in FsaAtlas. What should I do?](#)
- [How do I find out if a record that I submitted has been processed?](#)

### [System Access and Error Messages Questions](#)

- [My scholar never received the invitation with the login name and password. What could be the problem?](#)
- [What should I do if my account is locked?](#)
- [I invited a visitor and s/he cannot log in. Why?](#)
- [When I tried to submit a record, I received an error. What should I do?](#)

### [Other Questions](#)

- [Whom should I contact with further questions?](#)

## **Answers**

### Data Entry Questions

#### **How do I complete and upload a FedEx air bill?**

To create an electronic air bill, you must create a login with [fedex.com](http://fedex.com) using **your** FedEx account Number. Detailed instructions for creating the account can be found under the [Federal Express Air bills](#) section of the Manual.

#### **When I complete the FedEx form and click ship - I get an email indicating that the package will be picked up the same day. I don't want it picked up here and it is not clear when it should be at HIO. What should I do?**

You can fix this on the "Prepare Shipment" screen of the FedEx web site under Section 4 (Billing Details). Where it reads "Pickup/Drop-off," you can click "+Edit" and select the option to "Drop off package at a FedEx location."

Detailed instructions for creating the account can be found under the [Federal Express Air Bills](#) section of the Manual.

#### **What should I enter for Site of Activity?**

The easiest way to enter the Site of Activity is to use the "Pre-fill Site of Activity" drop-down menu. This contains a list of schools, hospitals, and departments at Harvard. After selecting a "Pre-fill Site of Activity," you may need to enter additional information.

For detailed information about entering the "Site of Activity," go to [Site of Activity](#) section of the Manual.

#### **What should I enter for Subject/Field Code?**

You should use the Subject/Field Code that was sent to you in the original invitation email (six numbers format xx.xxxx) that contained your ISD password. The format used for the Subject/Field Code Remarks is "School: Department", e.g. "HMS: Hospital acronym". Please contact your HIO Advisor (see [list](#) at the bottom of this FAQ) if you have further questions about the Subject/Field Code.

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## Procedural Questions

### What browser should I use?

ISD is compatible with **Internet Explorer through version 8.x, and Mozilla Firefox through version 3.5.x.** Use of other browser software (Safari, Google Chrome, etc.) **will** cause errors. If any other browser is used at any point in the process of inviting a visitor, it is likely to cause an error in submission.

### I tried to add a visitor and the system indicates that the record already exists in FsaAtlas. What should I do?

First contact the HIO. We will need to verify if that record is indeed duplicated (some people will have the very same first and last names). If a record appears as duplicated to the system, you will be brought to a screen that reads “Duplicates Record Found.” (see graphic below). If this happens, please contact your [HIO Advisor](#) to determine whether the duplicate record is for the same person you are trying to add. This would be the case if the visitor was previously under Harvard’s visa sponsorship.

If the HIO confirms that a record for the person you are inviting already exists in its database, you should use the HIO [eForm](#) available for download from the HIO web site instead of using ISD. Click **Cancel** to prevent a new record from being created in ISD.

If your HIO advisor confirms that this is a new visitor, you must proceed by clicking **Continue**.

The screenshot shows the ISD system interface. The top navigation bar includes 'SUNGARD HIGHER EDUCATION', 'Department View', and 'fsaATLAS eScholar'. A sidebar on the left lists navigation options like 'Home', 'Administration', 'Record Manager', etc. The main content area displays a 'Duplicates Record Found' message. The message text is: 'The following record already exists in eScholar database that might be a possible match with the visitor that you're trying to add.' Below this text is a table with the following data:

Attention	Last Name	First Name	Campus ID	Academic Department	Status
False	Herbert	Paul		Business School	Active

At the bottom of the message box are 'Continue' and 'Cancel' buttons.

Sometimes you will get a message about a duplicated record if the user name of your scholar is the same as someone else’s username in the system. You could change the user name (go to Tasks > Edit Visitor Login and Permissions) and that should fix the problem.

### How do I find out if a record that I submitted has been processed?

After submitting a record to the HIO, you can log in to ISD at any time to check whether the record has been processed. Search for the Visitor and click on “Notes.” After a document has been issued for the scholar, a note will be put in the record containing the scholar’s SEVIS ID number. For a J-1 visa, typical note

would be: *“Visa document sent 9/22/2010 by Air Mail for appointment from 4/1/11 - 5/31/11. SEVIS ID #N000000000”*. This information can be sent to the scholar in order to facilitate an appointment for a visa interview at a U.S. Embassy or Consulate.

Once a record is complete and your HIO Advisor does not have additional questions, J-1 visa documents (Form DS-2019) will be processed within 10 business days.

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## System Access and Error Messages Questions

### **My scholar never received the invitation with the login name and password. What could be the problem?**

First, check to make sure that the email address of the scholar is correct. If it is not, you can change it: go to Tasks >> Edit Visitor Login and Permissions. If the email address is correct, ask the scholar to check his/her spam folder. Sometimes the invitation may be sent there.

You can also re-invite the scholar and enter your own email address under c.c. so that you will receive a copy of the invitation email. You can always forward that invitation to the scholar. By re-inviting the scholar s/he will receive a new random password by email.

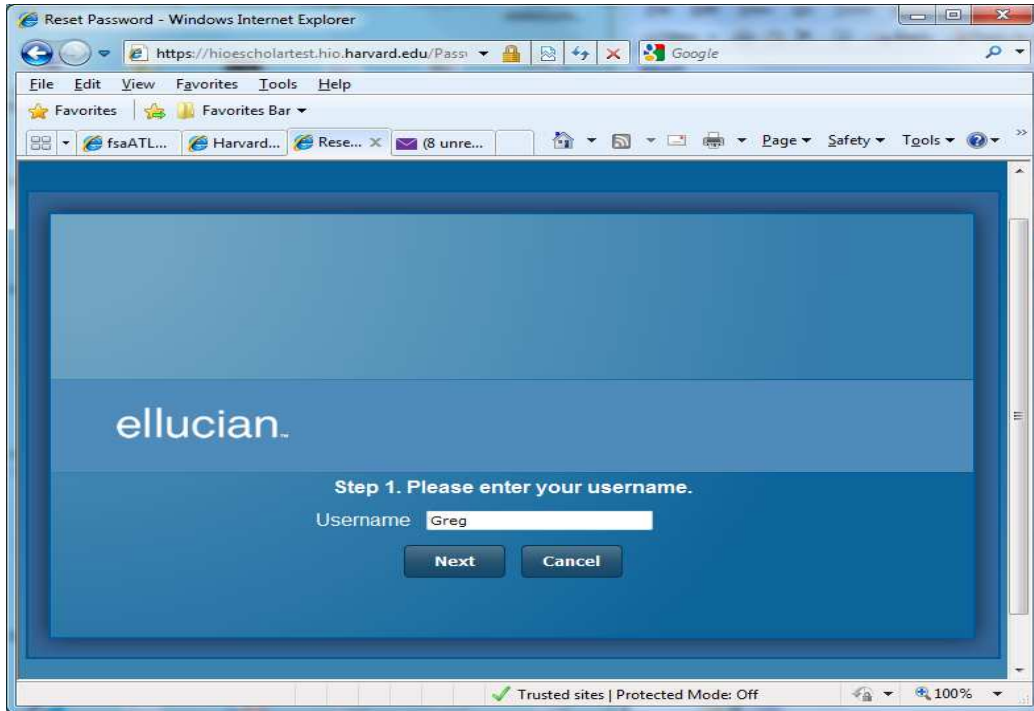
Please note that the web page address (URL) for the scholars is not the same as the one for you. Do not send the scholar the web address that you use for ISD.

### **What should I do if my account is locked?**

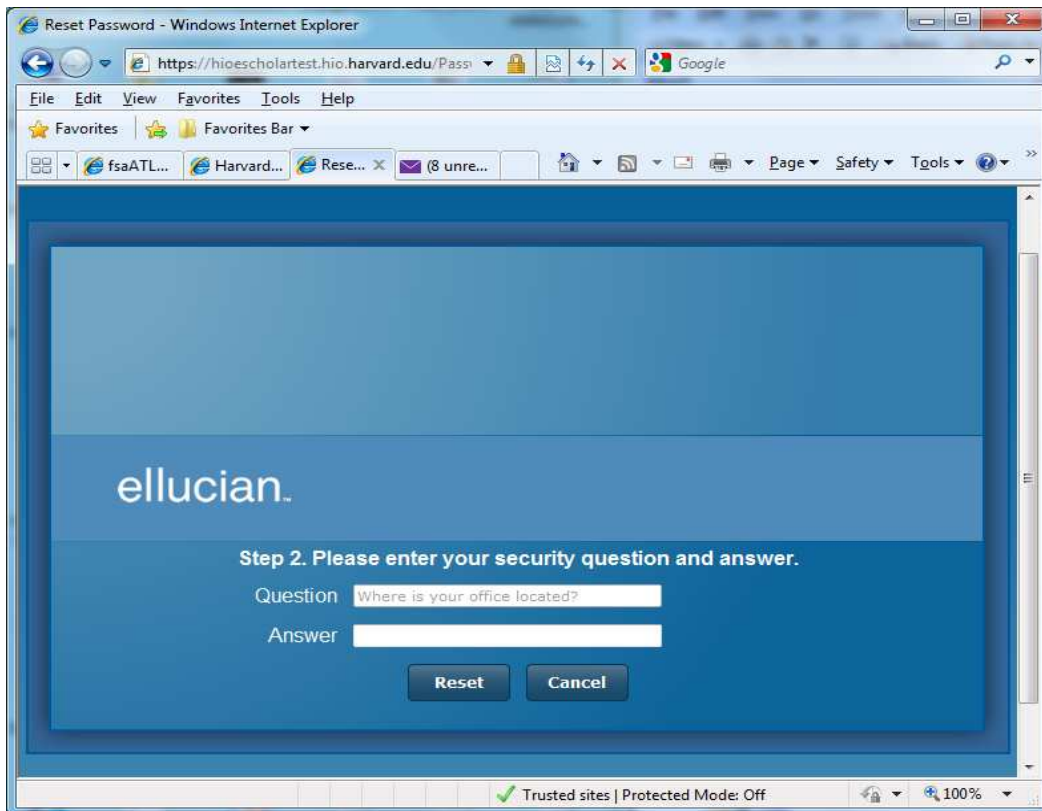
If your account is locked, it will need to be reset. Please click where it reads "Forgot password?"



Enter your user name and click “Next”



Enter the answer to your security question and click “Reset”



After you click on Reset you will receive a new password via email. Please remember to login and then go to “My Account” to change the password. **This procedure will work only if you had created a security question and answer previously.**

If the procedure above does not work, please email Ricardo Maldonado, [ricardo\\_maldonado@harvard.edu](mailto:ricardo_maldonado@harvard.edu) and he will unlock your account. The system will then send you an automatic new password by email. We suggest that you copy and paste the new password to avoid errors.

**I invited a visitor and s/he cannot log in. Why?**

The most common reason for a scholar being unable to log in to ISD is a password transcription error. The easiest way to avoid this error is for the scholar to copy and paste the automatically-generated password from his/her invitation email.

**When I tried to submit a record, I received an error. What should I do?**

If you receive an error when trying to submit a record to the HIO, contact Ricardo Maldonado (see below).

Other Questions
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**Whom should I contact with further questions?**

For visa related questions, please [contact your HIO Advisor](#).

If you are experiencing technical problems with ISD please contact Ricardo Maldonado at the Harvard International Office. Ricardo can be reached by phone at 617.496.2813 or by email at [ricardo\\_maldonado@harvard.edu](mailto:ricardo_maldonado@harvard.edu).

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