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International Student and Scholar Management Advisor Guide

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International Student and Scholar Management 9.2.0 Advisor Guide

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1 Introduction



This chapter includes an overview of the International Student and Scholar Management (ISSM) application, user responsibilities, and the terminology used in this guide.

- [“About this guide” on page 1-1](#)
- [“ISSM overview” on page 1-1](#)
- [“User responsibilities” on page 1-1](#)
- [“Audience and assumptions” on page 1-2](#)

About this guide



The Advisor Guide explains ISSM concepts and terminologies, using examples that illustrate the underlying thinking behind the ISSM application. The Advisor Guide does not provide step-by-step instructions for using ISSM. For instance, the User Guide explains the mechanics of adding an individual to the ISSM database, the Advisor Guide explains how to use ISSM in the context of a typical business process (such as admissions processing and SEVIS reporting), provides field-by-field explanations, and offers general guidelines regarding the application’s use in case-management scenarios.

ISSM overview



ISSM is a web-based visa case management application used by international student and scholar advisors. ISSM helps the institutions to manage the international student/scholar office more efficiently and effectively. With ISSM your international office can maintain SEVIS compliance, work more effectively to attract and retain international students and scholars, and increase productivity and service across all areas of responsibility.

User responsibilities



Certain assumptions have been made regarding IT personnel and end users (advisors) working with ISSM. They are outlined below.

- Generating immigration documents for international students and scholars.
- Keeping detailed records of international students’ and scholars’ immigration status.
- Maintaining international student and scholar information.



- Creating custom statistical reports.

Importing information from other databases to provide a single-source solution for managing international student and scholar information.

Audience and assumptions

This guide assumes that the reader is familiar with immigration processes as they relate to international students and scholars. SEVIS events are explained in terms of their relation to the overall immigration process. This guide should not be regarded as a legal interpretation of regulations or used as a basis for making advising decisions. Examples are presented using common scenarios, but schools may have unique circumstances and business processes that require solutions outlined here. Users seek education and immigration advice from US Government agencies such as the USCIS and the Department of State (DOS), or from other organizations such as the National Association of Foreign Student Advisors (NAFSA). Whenever possible, users should discuss recommendations provided in this guide with key offices and staff to determine optimal business practices.

Terminology

The following terminology is used in this guide:

Term	Definition
USCIS	US Citizenship and Immigration Services. The division of the Department of Homeland Security responsible for the non-immigrant and immigrant services formerly provided the Immigration and Naturalization Service.
DSO	Designated School Official authorized to perform visa and immigration responsibilities in relation to F-1/M-1 students and dependents.
Exchange Visitors	Individuals who enter the United States under the J visa program administered by the Department of State. The most common J categories are Student, Professor, Research Scholar, Short-Term Scholar, and Specialist. The shorthand for Exchange Visitor is “EV.”
ISSO	International Students & Scholars Office.
PDSO	Primary Designated School Official authorized to perform visa and immigration responsibilities in relation to F-1/M-1 students and dependents.

Term	Definition
Scholar	Individuals who visit the US to engage in scholarly research, teaching or some other scholarly activity, frequently involving employment at schools. “Scholar,” in this context, is not an immigration term and does not refer to any specific visa classification since individuals who are considered scholars may fall under one of several visa categories (F-1 OPT, J-1, H, O, P, TN, etc. The terms “Scholar” and “EV” are interchangeable.
School	An educational institution authorized by the USCIS to enroll F-1 or M-1 foreign students and/or authorized by the Department of State (DOS) to sponsor J-1 exchange visitors. Some schools also provide employment sponsorship using the H, O, P, TN, and Permanent Resident classifications.
SEVIS	Student and Exchange Visitor Information System.
Student	Individual who visits the US to attend school. In this book, the term refers to SEVIS-reportable F-1/M-1 students.

2 Campuses and Departments

This chapter includes information on the Campuses and various Departments.

- [“Introduction” on page 2-1](#)
- [“How campuses work” on page 2-1](#)
- [“How departments work” on page 2-2](#)

Introduction

Before using the application, it is important to understand the basic architecture of campuses, departments and users within the ISSM application. The configuration for campuses and departments is found under **Main Menu > Enterprise Manager > Configure Campus/Department Structure**. Even if you do not have access to settings in this menu, the following section will familiarize you with the underlying concepts.

ISSM is designed for use in both a single and multi-campus or departmental environments. In a multi-campus or departmental setting, it becomes necessary to control access given to users based on their respective roles at the school. The campus or departmental structure allows different offices (departments) to separate records and user roles by function and caseload.

How campuses work

In ISSM, a campus is defined as an entity that has its own SEVIS Code (F/M SEVIS School Code or SEVIS Exchange Visitor Program Number).

SEVIS batches are sent to the government using the SEVIS Code of each campus, so there should be at least as many ISSM campuses as there are School Codes. If the ISSM application is being shared by two entities with their own SEVIS Codes, then those two entities must be defined as two separate campuses. See examples A and B below for some sample campus or department configurations.

However, a school may choose to define two entities that share the same SEVIS Code as two separate campuses in order to logically separate records. In other words, it is not necessary for a SEVIS Code to be unique between two campuses. For logistical reasons, there may be more than one campus with the same SEVIS code, as shown in example C below.

If an entity has an F/M SEVIS code and a J-type SEVIS Program Number, it is not necessary to set up two separate campuses. Each campus can be assigned with an F SEVIS code and a J SEVIS Program Number, as shown in example D below.

Sample campus configurations

The table below contains four sample scenarios, and a possible campus or department configuration for each:

Example	Scenario	ISSM Campus Setup
A	A school has 3 locations, and each location has enrolled separately during the SEVIS I-17 process.	Each location must be set up as a separate campus.
B	A school received a SEVIS Program ID for its F program at the main institution, but it has a separate SEVIS Program ID for its Intensive English Program.	ISSM must be set up with two campuses, one for the main campus, and one for the Intensive English Program
C	A school has four campuses but they have all registered for SEVIS under a single SEVIS Code.	The school should create four campuses, and have them share the SEVIS code. This causes no technical problems with SEVIS transfers, and gives the school flexibility to configure the rest of the application to suit business needs.
D	A school has an F program and a J program.	A single campus should be created and assigned the F SEVIS school code and the J program number.

How departments work

Each campus can be assigned one or more administrative departments. An ISSM department is an entity that owns records. It is a sub-entity of a campus. User permissions are assigned on a per-department basis. Therefore, users can have different access levels to different departments' records.

As with campuses, departments can be viewed in one of two ways. A department may correspond either to an actual department at the school (physical departments) or to a workflow unit (virtual departments).

Physical departments

In this implementation model, a department is set up to mirror its physical administrative departments (offices) such as Intensive English Office, International Students Office, Graduate Admissions Office, International Scholars Office, Undergraduate Admissions Office, etc. If the university has many campuses, each with its own set of departments (or offices), then a similar departmental structure can be created within each campus.

Departments are often configured in terms of the offices that typically work with international students and scholars. These departments are not to be confused with (and should not include) academic departments such as *Physics* or *Engineering*. Although a student may be studying in the Physics Department, the International Students & Scholars Office (ISSO) will usually handle his/her advising; an academic department does not typically issue SEVIS documents or advise the student in immigration matters.

Only configure the department list in this manner if users (staff) in that office advise international students and/or scholars and need access to records belonging to that department. The fact that the student studies in the Physics Department is entered into the student's ISSM record under **Record Navigator > Profile tab > Academic Information** section, **Department/Program** field.

A student attending the Intensive English program could be assigned to (owned by) the Intensive English Department. Students applying to the school's undergraduate program may be assigned to (owned by) the Undergraduate Admissions Department. After the student arrives on campus (typically during orientation), the ownership of such undergraduate students would be reassigned to the ISSO.

Virtual departments

Departments can also be configured in terms of workflow requirements. A department may not necessarily be a physical office, but is regarded as a department within the context of ISSM. By defining departments in this way, records of a certain type are being grouped together to make them easier to work with. The following example illustrates a situation in which defining departments in a virtual sense is beneficial.

If Advisor 1 handles records with last names that begin with characters A through L, and Advisor 2 handles records with Last Names beginning with M through Z, the ISSM administrator could create a department called "Records A to L" and one named "Records M to Z". Then, each advisor would be given appropriate access rights to work with his or her respective record set.

Switching departments

During the business process it may be necessary to "switch" the ownership of records from one department/office to another. The most typical situation in which this arises is explained in the workflow example above, wherein an admissions office passes ownership

of a student's record to the ISSO once the student arrives on campus. This can be done by editing the **Department** field in the student's ISSM record (**Record Navigator > Bio tab > ISSM Settings** section). Alternately, record ownership can be changed using the **Campus DataLink** to switch the student's departmental identification. In the latter case, the IT office would alter the data extract from the campus system to change or reassign ownership of the record. Refer to the *Chapter 9 Campus DataLink Instructions* in the *Technical Guide* for more information about this process.

Departments and user permissions

Just as records are owned by departments, users are also assigned to departments. When a new user is created, ISSM asks for the name of the department in which the user works. Used only as an identification measure, this has no bearing on the user's access permissions. Users can have varying levels of access to records, a permission that is determined on a per-department basis. For example, a user can have permission to submit SEVIS batches for one department, but have limited or no access to another department's records. Refer to ["Users & User Permissions"](#) for more information about setting user permissions.

3 Users & User Permissions

This chapter includes information on the user permissions required to perform certain actions in ISSM.

- [“Introduction” on page 3-1](#)
- [“Global permissions” on page 3-1](#)
- [“Global permissions” on page 3-1](#)
- [“Departmental permissions” on page 3-4](#)
- [“Multi-level user permissions example” on page 3-5](#)

Introduction

User permissions is an important part of configuring the ISSM application and has impact on SEVIS batching, record access & ownership, form creation, Campus DataLink use, and the privacy of individuals with records in the ISSM database. Before assigning a given user permission level to an ISSM user, read this chapter to be sure that the desired permission level will not violate any security or privacy policy at the school.

To set user permissions, go to the main menu in **Enterprise Manager** and select **Manager User Permissions & Roles**. Click **Edit Info** in the **Permissions** column to edit permission information. Refer to *Chapter 7 The Enterprise Manager of the ISSM User Guide* for step-by-step instructions on setting user permissions.

The two types of permissions that can be set for each ISSM user are explained later in this chapter:

- Global Permissions
- Departmental Permissions

Global permissions

There are some permissions in ISSM that are not department-specific; they apply to all records in the ISSM application, regardless of which department owns the user (or the record the user is accessing). These permissions are listed in the table below:

Permission	Description
Manage User Permissions & Roles	Allows the user to modify user information and user permissions with the Enterprise Manager.
Configure Campus DataLink	Allows the user to configure Campus DataLink Active Fields and Campus DataLink Code Table Mapping with the Enterprise Manager.
Configure Campus/ Department Structure	Allows the user to modify the campus or department configuration with the Enterprise Manager.
Configure Employers	Allows the user to modify the list of employers in the Enterprise Manager.
Configure Academic Departments	Allows the user to configure International Scholar Dossier Academic Departments.
Maintain Select Box Values	Allows the user to configure ISSM drop-down menus using the Enterprise Manager.
Maintain Custom Fields	Allows the user to configure ISSM custom fields using the Enterprise Manager.
DataLink Operator	Allows the user to run Campus DataLink batches.
Configure PFS Setting	Allows the user to configure the Privacy Field Suppression (PFS) settings.
Configure Application Settings	Allows the user to configure and manage application configuration settings.
Create Form Letters	Allows the user to create templates for form letters using the Enterprise Manager.
Form Templates	Allows the user to create templates for immigration forms using the Enterprise Manager.
Manage e-Mail Alerts	Allows the user to configure E-Mail Alerts using the Enterprise Manager.
Advisor Notes Access	Users with this level of permission can read and modify notes about students/scholars. Advisor notes for can contain confidential information that advisors may not want to share with non-advising staff. This permission cannot be set at the department level; users with “Advisor Notes Access” privileges will be able to read notes in all records to which they have access. As such, there are potential privacy concerns associated with this permission. Do not assign it to any user that should not have access to information typically stored in these notes. Recommended for Advisors only.

Permission	Description
Can be assigned to Tasks and Appointments	Users with this level of permission can have appointments scheduled for them in the Task and Appointment Manager. All ISSM users can schedule appointments with other users. For example, administrative staff may schedule appointments with advisors, but will not have their own appointments. In this case, the advisors should be given “Can be assigned to Tasks and Appointments” access, and the administrative staff should not, since appointments will not be scheduled with them. Recommended for Advisors, Document-producing staff members, and possibly IT personnel.
Configure International Scholar Dossier	Allows the user to format & generate International Scholar Dossier Form A/B & Form B.
View Approved International Scholar Dossier Records	Allows the user to transfer records from the International Scholar Dossier system into the primary ISSM database.
Report Writer Administrator	Allows the user to determine which fields will be available for reporting with the Report Writer.
Manage E-mail Blasts	Allows the user to manage e-mail blasts.
Delete Record	Allows the user to permanently delete records from the system.
Enable RTI Access	Allows the user to launch Real-Time Interface (RTI) in a new window. (e.g. Internet Explorer).
Configure Registration Requirements	Allows the user to add or edit university requirements on the Student Portal.
Configure Certificate of Understanding	Allows the user to edit and display the certificate of understanding text on the Student Portal.
Manage Portal Fields	Allows the user to specify the fields that are displayed on the Student Portal and to edit those fields.
Configure Portal Events	Allows the user to add or remove notifications of upcoming events on the Student Portal.
Manage Portal Accounts	Allows the user to create or activate portal accounts and to manage accounts in batches.

Departmental permissions

Each record must be assigned to an owner department. By virtue of this, records will belong to various departments based on some characteristic related to workflow or business process needs. For example, all incoming students may initially belong to the Admissions Office until they come to campus. Then, after they arrive, the ownership of the records will be transferred to the International Students & Scholars Office.

A user can be granted or denied access to records on a per-department basis in order to suit business requirements. For example, a user can have full access to records owned by Department A, partial access to Department B's records, and no access to Department C's records.

The permission levels are cumulative; if a user has *Sign/Approve SEVIS Events* permissions for a given department, the user will also be able to create and modify that department's forms and records.

Permission Level	Description	Typical Usage
Upload and Download SEVIS Batches	<p>Users with this permission level can submit batches of data to SEVIS. Unless the user has SEVIS event and/or batch privileges, he or she will not be able to see the "SEVIS Management" icon on the ISSM Main Menu.</p> <p>Also has permissions to generate forms.</p>	<p>Ordinarily, only the PDSO would be given this access level. SEVIS regulations stipulate that the only the PDSO can submit batches to SEVIS (the PDSO's username is included in every batch that gets submitted to the USCIS). For some schools, it is restrictive to only allow the PDSO to submit SEVIS batches. Consequently, this permission level can be assigned to non-PDSO users, and they are able to submit batches on the PDSO's behalf. Carefully consider the potential ramifications of granting this permission to non-PDSO users: The PDSO is legally responsible for a batch, regardless of who uploaded it.</p>
Sign/Approve SEVIS Events	<p>Allows the user to review, modify, approve, or remove pending SEVIS events for individuals owned by the selected department. Unless the user has SEVIS event and/or batch privileges, he/she will not be able to see the "SEVIS Management" icon on the ISSM Main Menu.</p>	<p>Typically, this permission is granted to DSO users. In most implementation models, the DSO triggers SEVIS events and adds them to batches, which the PDSO then approves or denies, and subsequently uploads to the USCIS.</p>

Permission Level	Description	Typical Usage
Create Forms	Allows the user to create, view, modify, and delete records. Also allows the user to generate non-SEVIS BCIS forms, such as the I-129 or I-140. Although <i>Create Forms</i> users can enter data into these forms, they cannot work with SEVIS events.	This level of access permission should be given to staff who are authorized to generate new non-SEVIS documents, or to issue replacements for misplaced forms. Users performing Campus DataLink batches to create new records needs this level of permission.
Read/Write	Allows the user to view, modify, or delete records. <i>Read/Write</i> users can view the contents of non-SEVIS USCIS forms, but cannot create them.	This permission should be assigned to personnel who work in the client intake process, or who enter data to update existing records. Users performing Campus DataLink batches to update existing records needs this level of permission.
View	Allows the user to view forms and records owned by the selected department.	Front-desk personnel who do not have authority to modify student records, but may need to periodically view the data they contain.
None	Denies the user access to all forms and records for the selected department.	IT Personnel maintaining the ISSM server or configuring the application.
Edit/Delete Reports	Allows the user to view, run, modify, rename, delete, or un-delete reports “owned” by the department.	PDSO/RO users and application administrators.
Run/View Reports	Allows the user to view, run, and modify reports “owned” by the department.	DSOs, AROs, and other advisors.
None (Report Writer)	Denies the user all access to reports “owned” by the department.	IT Personnel maintaining the ISSM server or configuring the application; anyone to whom “View” access for database access wouldn’t be given.

Multi-level user permissions example

Assume that a school has two offices that work with international students: an Admissions Office and an International Students & Scholars Office (ISSO). The Admissions Office issues initial I-20 forms to new students and handles their cases until they arrive for orientation. At that point, the ISSO assumes responsibility for the students and submits SEVIS batches for them. After the school’s orientation check-in, the admissions staff should not be able to access the student’s record. Assume further that a DSO in the Admissions Office handles the Create Student SEVIS event, and that the Director of the

ISSO (the PDSO) reviews all SEVIS events before they are submitted to the USCIS. In such a case, two departments—Admissions and ISSO—should be created.

DSO users working in the Admissions Office would be given *Sign/Approve SEVIS Events* access to records owned by the Admissions Office. They should have *None -level access* to records owned by the ISSO. At that point, the users could generate SEVIS events for these records, which would then be transferred to the ISSO and uploaded to SEVIS by the PDSO. Once the student's departmental ownership had transferred to the ISSO, the DSO users in the Admissions office would no longer have access to the records.

The Director of the ISSO (PDSO) should have *Upload and Download SEVIS Batches* level for both departments. That way, the PDSO could review and/or process batches and records in either department.

4 Profiles and How They Work

This chapter includes information on the various profiles that can be created in ISSM, and the working principle of the Profiles.

- [“Introduction” on page 4-1](#)
- [“Profiles in context” on page 4-2](#)
- [“Working with profiles” on page 4-2](#)
- [“Other profile fields” on page 4-8](#)

Introduction

An individual can change his/her immigration status while staying in the US. Individuals visit the US for a variety of reasons, such as tourism, education, academic research, employment, and so forth. Based on the reason for the visit to the United States, a visa is issued to the individual under the corresponding visa class or category, such as F-1, J-1, H-1, etc. The visa itself is a machine-readable stamp affixed to a page in the individual’s passport, allowing him/her to seek entry into the US. When the individual enters the US, an immigration official at the Port of Entry gives him/her an immigration status which in most cases corresponds to the type of visa in the individual’s passport. The immigration status is noted on the I-94 (the Arrival-Departure card), which also notes the duration for which the immigration status has been granted.

Student advisors and scholar advisors assist the individual when processing a change in immigration status. Consequently, advisors need to learn the details of an individual’s immigration history to advise them most effectively. The “profiling” feature of ISSM keeps track of a student or scholar’s immigration history, allowing advisors to provide effective assistance to the individual.

In ISSM, a **Profile** refers to the period of time in which an individual is in a particular immigration status or is seeking to enter the US under said status. Depending on changes in immigration status, an individual may have multiple profiles over time. A student or scholar’s profile information can be accessed and/or modified from the Record

Navigator's **Profile** tab. Refer to *Chapter 3 The Record Navigator* of the *ISSM User Guide* for step-by-step instructions on setting Profile information.

 **Note**

A basic understanding of US immigration regulations and international student advising processes is needed to fully understand how ISSM profiles fit into the larger context of foreign student advising and reporting. ■

Profiles in context

The visa classification (in the passport) and the immigration status (on the I-94 card) have distinct meanings and purposes. Visa stamps are issued by the Department of State (DOS) through US embassies and consulates in foreign countries. A visa stamp is an “entry” document and is only relevant for the purpose of entering the US. Once in the country, the individual’s visa is no longer used; the immigration status noted on the I-94 card the important document. As long as the individual’s immigration status has not expired and he/she adheres to the restrictions and responsibilities of the maintaining status, he/she may continue to stay in the US despite the expiration of the visa stamp in the passport.

Some visitors change their immigration status while in the US. An individual may enter the US on a business trip with a B-1 visa stamp in his/her passport, apply for admission to a school, and subsequently apply to change his/her immigration status to F-1, H-1 or J-1. Upon approval of said application the USCIS updates the individual’s I-94 card to reflect the change. The visa stamp in the passport will not change. If this individual were to leave the US and to re-enter in the new immigration status, a new visa stamp reflecting the immigration status update would be required.

An individual is admitted to a US school and issued an F-1 visa. Upon arrival in the U.S., this individual is granted F-1 status by an Immigration Inspector and is therefore considered to be in F-1 status. The individual enrolls in classes and subsequently graduates. Upon graduation, the individual finds a job and his/her employer applies for a change of immigration status to H-1. If the USCIS approves this change, the individual will then be in “H-1 status”. If this individual were to leave the US and attempt to gain re-entry, he/she must apply for an H-1 visa at a US consular post abroad.

Working with profiles

An individual’s profile contains information about the individual’s immigration status, standing in SEVIS, role at the school, and academic background. When creating a new record in ISSM, the user must enter this information in order to complete the profile.

The fields used in the ISSM application to enter this information can be accessed from the Record Navigator’s Profile tab, and are explained below.

Profile type

The **Profile Type** is not an official immigration term or definition. It is used only in ISSM. The **I-94 (Immigration) Status** field (displayed on the Forms tab) is used to store the actual immigration status of an individual. As explained earlier, a person is granted a particular immigration status when he/she enters the US. At any given time, a person can only have one immigration status. In most cases, the immigration status of an individual will match his/her currently active Profile Type.

There are many situations when advisors need to track a person based on his/her anticipated immigration status. Typical scenarios include admitted students planning to enter the US on an F-1 or a J-1 visa, a scholar planning to enter the US on an F-1 visa, a graduated F-1 student who is seeking to apply for a change of status to H-1, etc. In the first two cases, the prospective student or scholar has no immigration status, yet advisors need to store various data and issue immigration documents relevant to the person's anticipated status. In these cases, the Profile Status would be Pending. In the third example, the person may still be in F-1 status (participating in OPT, for instance), but he/she will also have an additional H-1 profile that is marked as Pending.

A person may have several profiles, each with a different profile type. For instance, in the example used above, the individual would begin his/her academic career with an F-1 profile, and switch to an H-1 profile when he/she begins work after graduation. If the individual returns to the school as a graduate student at a later date, he/she would have a new F-1 profile.

Of the visa and immigration classifications available to visitors, the F, J, H, O, P, and TN categories are most relevant to academic institutions:

Category	Classification and Visa	Description
F	Student	F-1 visas are given to students attending US schools; F-2 visas are given to spouses and children of F-1 students. F-1 and F-2 visa-holders are SEVIS-reportable.
J	Exchange Visitor	J-1 non-immigrants are often referred to as Exchange Visitors. There are twelve J-1 categories. Student, Short-term Scholar, Researcher, Professor, and Specialist are the categories most commonly used by educational institutions. J-2's are dependents of J-1's. All J-type visa-holders are SEVIS-reportable.
H	Specialty Occupation Employees	In the academic environment, H-1 visa holders are generally employees who hold teaching, research, or other paid positions.

Category	Classification and Visa	Description
O	Extraordinary Ability Employees	Individuals with outstanding abilities or who are nationally or internationally established experts in their fields are often granted O-type visas.
P	Artists, Athletes, and Entertainers	Performers, athletes, and other entertainers are often issued P-type visas. Often, art schools will use this category for visiting actors, dancers, musicians and other performers.
TN	Trade NAFTA Employees	A special visa category used for Canadian and Mexican nationals working in the US under the North American Free Trade Agreement (NAFTA).

Profile subtype

Used in combination with the Profile Type field, The Profile SubType field allows advisors to further describe an individual's role. ISSM uses three Profile SubType values: **Student**, **Scholar** and **Other**. In the context of academic immigration advising, the terms Student and Scholar broadly describe an individual's role at a given school. Assigning a Profile SubType to an individual further refines Profile Type information. For instance, an F-1 individual becomes an **F-1 Student**. The functions of these fields are explained in greater detail below.

Users can create profiles with any combination of Profile Type and Profile SubType (i.e., F-1 Student, J-1 Scholar, H-1 Other, H-1 Student). However, some combinations may simply not be possible under immigration law or may not make sense from an immigration standpoint (e.g., Profile Type: C-1, Profile SubType: Scholar).

Profile SubType	Description
Student	The subtype Student should be used to define anyone studying at the school. The majority of international “students” on any campus are in F or J status. These individuals’ Profile Type should be set to F-1 or J-1, with the Profile SubType set to Student. Some schools keep track of all foreign individuals, even those who are not under the school’s own visa or immigration sponsorship. In these cases, Profile SubType values may be set to Student, such as an H-1 visa-holder who has enrolled in classes.
Scholar	Use the Scholar subtype to broadly describe instructors, researchers or individuals otherwise engaged in some form of scholarship. As such, the term “Scholar” differentiates these individuals from students. The majority of scholars are typically in J, H, O, P, or TN status. However, scholars may be in other immigration classifications, such as F-1 (OPT), J-1 (AT) or B-1/B-2). Whether an individual holds a paid or unpaid position has no bearing on his/her “Scholar” status.
Other	The Profile SubType Other has been created to define roles of persons who can be considered neither students nor scholars. Examples of this are non-academic staff and administrative positions, doctors, or other employees the school does not view as scholars.

Some common Profile Type and Profile SubType combinations are listed below:

Type	Sub Type	Description
F-1	Student	Individuals in F-1 status studying at the school.
J-1	Student	Individuals in J-1 status studying at the school.
J-1	Scholar	A non-student J-1 (researcher, short-term scholar, professor, etc.).
H-1	Scholar	An individual sponsored for employment by an academic department.
F-1	Scholar	An F-1 on OPT from another institution performing research at the school.
H-1	Student	An H-1 employed elsewhere who is studying at the school.

Profile status

The **Profile Status** field defines the nature of the profile and, in the case of SEVIS-reportable records, may trigger SEVIS events. By using the **Profile Type** in conjunction with the Profile Status field, advisors can keep chronological information on the various periods in a person's immigration history and, when necessary, they can simultaneously store multiple profiles for a person (one being marked as Active/Enrolled while the others are marked as Pending, Terminated, or Complete).

There are nine profile types in ISSM. While the meaning of them is subject to interpretation based on workflow needs, ISSM recommends that they be used in the manner described below:

Note

Note that specific logic of triggering of events based on the changes in the profile status is discussed in the SEVIS section of this document ■

Profile Status	Description
Active/Enrolled	Assign this status to individuals who are present or enrolled in classes, but not necessarily SEVIS-reportable. Examples include H-1 visa-holders currently employed by the school.
Complete	Used with SEVIS and non-SEVIS statuses. In the case of SEVIS statuses, <i>Complete</i> indicates that the individual has successfully completed his/her program. Examples of <i>Complete</i> status individuals include graduated students and employees who have moved on to other positions or reached their immigration status' expiration date.
No-Show	Indicates that the individual did not arrive on campus as expected.
Pending	A general Pending status used for non-SEVIS individuals. For instance, when filing an H-1 application for a faculty member, his/her Profile Status would be considered <i>Pending</i> until approval of the application, after which the record would be switched to "Active/Enrolled"
SEVIS - Active	Person who is attending your institution and is a SEVIS-reportable F, J, and M-type. Only F-1/F-2, J-1/J-2, and M-1/M-2 individuals are reported to SEVIS.

Profile Status	Description
SEVIS - Initial	This is not a status that you can assign to a student. When you Change Education Level event, a second profile is created for this student and has the SEVIS - Initial status. Assign this status to SEVIS-reportable F, M records.
SEVIS - Pending	Assign this status to F, J, and M visa-holders subject to SEVIS reporting. The SEVIS - Pending status can be used to differentiate between SEVIS-eligible students & EVs that have been admitted but have not yet reported to school, and those already registered/enrolled. Placing an individual in a <i>SEVIS - Pending</i> Profile Status generates events in the same manner as placing this person in SEVIS - Active status. <i>SEVIS - Pending</i> individuals are switched to <i>SEVIS - Active</i> during orientation, or when a Registration event in ISSM is triggered. Refer to “Program Events” for more information. At larger campuses, this change is often made with the Campus DataLink. By doing this, staff will easily locate the “no-shows” (by searching for the SEVIS - Pending statuses) and take the appropriate action such as terminating the SEVIS - Pending individuals’ records or deferring their attendance.
Terminated	Use for SEVIS and non-SEVIS statuses. In the case of SEVIS-reportable individuals, Terminated individuals whose program has been terminated, as the term is used in SEVIS. In the case of non-SEVIS individuals, the Terminated status can be assigned according to local business practices. For instance, some schools differentiate between individuals who completed their activity normally and individuals whose activity ended under unusual circumstances (firing, expulsion, etc.) by designating the latter category as <i>Terminated</i> .
Student Cancelled / EV Invalid	Use for a student or exchange visitor that has decided to not attend at your institution. Be sure that the person is not already attending. If already attending, then select the terminated option.

Profile sub status

Used in combination with the Profile Status field, the Profile SubStatus field allows advisors to further describe an individual’s status within the system. ISSM uses four Profile SubStatus values: **Change of Status**, **Deactivated**, **Reinstatement-Pending**, and **Transfer-Pending**. Assigning a Profile SubStatus to an individual further refines Profile Status information.

Profile SubStatus	Description
Change of Status	Indicates that the individual has applied for a change of status.
Deactivated	Indicates that the individual's student record is in a deactivated status.
Reinstatement-Pending	Indicates that the individual has applied for reinstatement at a school, but has not yet been approved.
Transfer-Pending	Indicates that the individual has started but not completed the transfer process to another school.

In addition to these 4 values, ISSM clients can define and add their own additional values for this field.

Profile start date and profile end date

The beginning and end dates of the employment or education. Dates in these fields will automatically be entered in forms (e.g., I-20, DS-2019, I-129) as the beginning and ending dates of study or employment.

Note

Students and exchange visitors may lawfully enter the US 30 days before this date. For F and M students, SEVIS record will be automatically invalidated if a Student-Registration report is not received by SEVIS within 90 days of this date. For J-type individuals, a "Validate" report is due to SEVIS for "shows" no later than 30 days after the "Start Date" or an "Status - End" report will be due for "no-shows". ■

Other profile fields

For a complete listing and explanation of the fields used in the Profile tab, refer to ["Profile Tab"](#) in this guide.

5 Notes, Tasks and Appointments

This chapter includes information on the Notes, Tasks and Appointments tab available in ISSM.

- [“Introduction” on page 5-1](#)
- [“Notes” on page 5-1](#)
- [“Tasks” on page 5-2](#)
- [“Appointments” on page 5-5](#)

Introduction

This chapter outlines the uses for Advising Notes, Tasks and Appointments in ISSM. These features can all be accessed from Record Navigator on **Interactions** which is documented in *Chapter 3 The Record Navigator* of the *ISSM User Guide*.

Existing tasks and appointments can be accessed with the Task & Appointment Manager, refer to *Chapter 4 The Task and Appointment Manager* of the *ISSM User Guide*.

Notes

After an advising session, advisors often record notes regarding a student or scholar’s case or situation. ISSM stores these notes, which are available to other advisors in the International Students & Scholars Office. There can be an unlimited number of notes in a given record. Like appointments and tasks, Notes are stored under the **Record Navigator’s Interactions** tab, where the individual’s entire case-management history can be viewed in a single location.

Note

None of the fields mentioned in this chapter are reported to SEVIS, and modifications to them will not trigger SEVIS events.

The permission to view and/or modify notes is granted across the application. If you can view the notes made in a single record, you can view the notes made in the records of all records. Out of respect for privacy, use discretion when entering notes. ■

Entering a note in a student or scholar's record

To create or modify the contents of a note, open the appropriate record and click the Notes icon on the Record Navigator tool bar of the Interactions tab. Refer to the *ISSM User Guide* for step-by-step instructions on working with notes. The table below lists the fields used when creating notes:

Name of Field	Description
Date	Date of Note, in mm/dd/yyyy format.
Category	A general category for the note, such as “Academic Issue,” “Cross-Cultural Adjustment,” or “Immigration Issue.” Use the Enterprise Manager to modify the list.
Advisor	Username of advisor or staff member entering the note.
Description	A descriptive category for the note, such as “Change of Major” or “Personal Issues.” Use the Enterprise Manager to modify the list.
Text	The text of the note. Limited to 500 characters.

Tasks

Most advisors maintain “to do” lists. ISSM assists advisors and support personnel in tracking tasks that must be performed on behalf of students and scholars by combining the flexibility of a paper-based system with the benefits of job-ticketing logs used by many schools to keep track of incoming cases. When used in conjunction with the **Task and Appointment Manager**, these features help students and scholars avoid missed deadlines and help keep advisors aware of changes to an individual’s status, location, or personal information.

The application maintains a chronological history of requests made by the individual, actions taken on the individual’s behalf, notes the user(s) responsible for carrying out tasks, and the task’s status. There is no limit to the number of tasks that can be inserted in an individual’s record.

The table below lists the fields used when creating or modifying a task.

Note

Some of the fields listed in the following table do not appear when creating a new task with the Task button at the top of the Record Navigator window. However, they do appear if the form is modified from the Task and Appointment Manager or the Interactions tab. The names of these fields are *italicized*. ■

Field Name	Description
Client Name	The name of the student or scholar for whom the task is being performed.
Department Name	The name of the ISSM department that “owns” the student or scholar record.
Status	The status of the task: Active, Complete, or Deleted.
Source	The manner in which the student or scholar contacted the office (E-mail, Phone, Walk-In, etc.) to request the task. These values can be changed with the Enterprise Manager.
Task Type	The task’s type. These values can be changed with the Enterprise Manager.
Note	Staff notes made at the time the task was initiated. Limited to 500 characters.
Send e-mail upon task completion?	When checked, ISSM will send e-mail to the student or scholar when the task’s status is changed from “Active” to “Complete.”
E-mail type to send Task to	The e-mail address type(s) to which the task is to be sent. This field will have the list of e-mail address types that have been defined. More than one type can be selected and the task will be sent to the e-mail addresses associated with those e-mail address types.
E-mail message for client	The text of the e-mail message sent to the student or scholar upon completion of the task.
Intake Advisor	The name of the user who created the task.
Advisor	The name of the user assigned to the task.
Instructions for Processor	Instructions for the personnel processing the task. Limited to 255 characters.
Processor	The username of the processor assigned to this task.
Pick Up	How the student or scholar will pick up the task (E-mail, Walk-In, etc.) once it has been completed. These values can be changed with the Enterprise Manager.
Date Started	The date on which the task was created, in mm/dd/yyyy format.
Date Required	The date by which the task must be complete, in mm/dd/yyyy format.
Date Completed	The date on which the task was completed, in mm/dd/yyyy format.

Typical usage of the task management system

The ISSM Task and Appointment Manager system provides organized storage of tasks. In the typical workflow of this feature, users open a record, create a task, and then the advisor assigned to the task carries it out.

Note

The permission to view tasks is global; if a user can view any tasks, he/she can view all tasks. Out of respect for student or scholar privacy, use discretion when inputting information in tasks. ■

The example below demonstrates how this process would work in a typical usage scenario.

Task intake

The task management process is initiated by a request from a student. At that point, a front-desk staff person accesses the student's record through the ISSM **Record Navigator**, in the **Interactions** tab. If the student already has a similar task pending, the staff member may check on its status. If the request constitutes a new task, the staff member clicks **Task** and enters the new task's details. As part of this process, the staff member should assign the task to an advisor.

If an appointment with an advisor is required in order to satisfy the student or scholar's request, front desk staff would make an appointment using the Record Navigator's **Appt** button instead. After the appointment, the student or scholar's advisor would be the person who creates the new task and assigns it to the appropriate user.

As an alternate approach, the International Students & Scholars Office may create a dummy user in ISSM named **Unassigned Tasks**. All tasks could then be first assigned to this dummy account. Then, advisors would log into ISSM with their own usernames and view the tasks assigned to **Unassigned Tasks**, re-assigning to themselves the ones with which they are best-suited to work. Since this approach requires proactive task-checking on the part of advising staff, the possibility exists that tedious or difficult tasks could be orphaned, without any user taking ownership of them. As such, this approach should only be used in offices with clearly-defined roles and business rules.

Processing and executing a task

After the task intake process has been completed, the advisor reviews the case and, if any paperwork needs to be completed, will assign it to a staff member who handles data entry and/or the production of documents. ISSM refers to this staff member as the Processor. Depending on circumstances, the Processor may or may not be an advisor.

After receiving the request, the Processor produces any necessary paperwork or performs any necessary administrative tasks. When complete, he/she marks the task as "complete,"

which sends an e-mail to the individual if the option to do so was selected. The e-mail address is added when creating or modifying the task.

Appointments

The Record Navigator can be used to schedule appointments with individuals. Like notes and tasks, appointments created with the **Record Navigator** appear in, and can be modified with, the **Task and Appointment Manager**.

Note

While explicit permission must be granted for a user in order to assign appointments to him or her, the permission to view appointments is global; if a user can view any appointments, he/she can view all appointments. Out of respect for student or scholar privacy, use discretion when inputting information in appointments. ■

The following table lists the fields used when creating or modifying an appointment:

Field Name	Description	Data Type
Source	The manner in which the student or scholar contacted the International Students & Scholars Office (e.g. E-mail Phone, Walk-In).	Text
Appointment Type	Enter here the nature of the appointment (e.g. Academic Issues, Change of Status, Cross-Cultural Adjustment, New Admission, Personal Counseling, Visa Related, etc.). The contents of the list can be customized with the Enterprise Manager.	Text
Appointment Note	Explains why the student or scholar is seeking an appointment. Limited to 500 characters. Note: Minutes of the appointment should be recorded by the advisor in the Notes section of the Notes, or Tasks and Appts tab.	Text
Meeting with	The name of the advisor with whom the appointment is taking place.	Text
Check Advisor Availability Button	Click Check Advisor Availability to view appointments scheduled for the Meeting with advisor.	N/A
Date Begins	Date of the appointment, in mm/dd/yyyy format.	Date

Field Name	Description	Data Type
Calendar Button	Click a date in the Calendar to select a new date for the appointment.	N/A
Time Begins	Time appointment begins.	Time
Time Ends	Time appointment ends. Appointments in ISSM are scheduled in 15-minute increments.	Time

Typical usage of the appointment management system

The typical workflow model for working with appointments is similar to the process used when working with tasks. The example below demonstrates how this process would work in a typical “real-world” scenario.

Appointment intake

A student calls to make an appointment with an advisor. During the call, the staff member handling the initial request will log into ISSM and open the student or scholar’s record. The staff member will click **Appt** and enter any information regarding the appointment and assign it to the student or scholar’s advisor. When entering the appointment, intake staff should describe the nature of the appointment so that the advisor can prepare for the appointment.

As an alternate approach, create a dummy user in ISSM named Unassigned Appointments. All appointments could then be first assigned to this dummy account. Then, advisors would log into ISSM and view the tasks assigned to Unassigned Appointments, re-assigning to themselves the ones for which they are best suited.

Appointment processing and execution

Advisors will periodically check their appointments in the **Task and Appointment Manager**. After learning about a new appointment, the advisor would prepare for the appointment in the usual manner.

Note

Since users can view the appointments scheduled to other users, the head advisor could check the schedules of any advisors who are absent and reassign the appointments accordingly. ■

6 Bio Tab

The Record Navigator’s Bio tab contains basic identifying information about the individual. This chapter helps you understand how ISSM expects the fields in the Bio tab to be populated.

Contents of the Bio tab

Name

These fields should be populated with the individual’s name. They are explained in the table below.

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Surname/Primary Name	Last name or family name. In cases where an individual does not have both a first and last name, the single name should be entered here. Modifying this field generates an “Update Personal Information” (F-1) or an “Update Biographical Information” (J-1) event. LastName in the Campus DataLink.	Yes	Required	Text	40 characters
First/Given Name	The individual’s first name. When the first name is available, it should be always be entered here and submitted to SEVIS since it is important identification information that appears on all immigration documents. It is only optional in SEVIS transfers for individuals without both a first and last name. Modifying this field generates a “Update Personal Information” (F-1) or an “Update Biographical Information” (J-1) event. FirstName in the Campus DataLink.	Yes	Optional	Text	80 characters

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Middle Name	Middle name or initial on as it appears on the passport. While optional in SEVIS, this field is often used with official documents and forms. If available, it should be entered. Modifying this field generates an “Update Personal Information” (F-1) or an “Update Biographical Information” (J-1) event. MiddleName in the Campus DataLink.	Yes	Optional	Text	40 characters
Suffix	Name suffix (if it exists). SEVIS only allows the following suffixes: Jr., Sr., I, II, III, and IV. No other suffixes should be entered. Modifying this field generates a “Update Personal Information” (F-1) or an “Update Biographical Information” (J-1) event. Suffix in the Campus DataLink.	Yes	Optional	Text	Drop-down menu

Preferred name

Many individuals prefer to be addressed with an alternate name. Typically, there are only preferred first names. To ensure flexibility, ISSM provides a place to enter preferred values for the other name fields. Refer to the following table for a listing of how these fields should be used.

Note

These tags are not SEVIS-reportable; changes to them will not trigger SEVIS events. ■

Field Name	Description	Data Type	Limits
Preferred Surname/ Primary Name	Preferred Last Name (if it exists). PreferredLastName in the Campus DataLink.	Text	40 characters
Preferred Middle Name	Preferred Middle Name (if it exists). PreferredMiddleName in the Campus DataLink.	Text	40 characters

Field Name	Description	Data Type	Limits
Preferred First/Given Name	Preferred First Name (if it exists). PreferredFirstName in the Campus DataLink.	Text	40 characters
Preferred Name Suffix	Preferred Suffix (if it exists). Available options are: Jr., Sr., I, II, III, and IV. PreferredSuffix in the Campus DataLink.	Text	Drop-down menu

Passport Name

These fields should be populated with the individual's name as it appears on the individual's passport. Many schools report name information to SEVIS as it appears on the passport. They are explained in the table below.

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Passport Primary Name	Primary name as printed in passport. PassportPrimaryName in the Campus DataLink.	Yes	Optional	Text	40 characters
Passport Secondary Name	Secondary name as printed in passport. PassportSecondaryName in the Campus DataLink.	Yes	Optional	Text	80 characters
MRZ Display	The individual's name as it appears in the Machine Readable Zone (MRZ) of the passport. This field is automatically populated when the individual's record is saved and is a read-only field.	No	Optional	--	--

SEVIS

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
SEVIS ID	Provided by SEVIS during the Create Student event. If the record was entered in SEVIS with the SEVIS Batch Interface, then ISSM automatically populates this field with the returned SEVIS ID. If the record was added to SEVIS through the RTI, the SEVIS ID should be manually entered in this field.	No	Required for events that update student/exchange visitor data. Not Required for the "Create Student" event.	Text	11 characters

Biographical information

The fields listed in the table below contain general biographical information about the individual. They should be as thoroughly filled in as possible.

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Date of Birth	The individual's Date of Birth. Modifying this field generates a "Update Personal Information" (F-1) or an "Update Biographical Information" (J-1) event. BirthDate in the Campus DataLink.	Yes	Required	Date	mm/dd/yyyy
City of Birth	The individual's City of Birth. A list of frequently-used cities can be created using the Enterprise Manager, or the data can be manually entered into a text box. BirthCity in the Campus DataLink.	No	Non-SEVIS	Text	50 characters
Country of Birth	The individual's country of birth. Modifying this field generates a "Update Personal Information" (F-1) or an "Update Biographical Information" (J-1) event. BirthCountryCode in the Campus DataLink.	Yes	Required	Text	Drop-down menu
Birth Country Reason	If the individual's country of birth is the U.S., this also needs to be set for SEVIS.	No	Required if Country of Birth is US	Text	Drop-down menu

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Country of Citizenship	<p>The individual's country of citizenship. Although the SEVIS ICD lists this field as optional, ISSM recommends filling it in since it will be used in many SEVIS documents.</p> <p>Modifying this field generates an "Update Personal Information" (F-1) or an "Update Biographical Information" (J-1) event.</p> <p>CitizenshipCountryCode in the Campus DataLink.</p>	Yes	Optional	Text	Drop-down menu
Marital Status	<p>The individual's marital status.</p> <p>Marital in the Campus DataLink.</p>	No	Optional	Text	Drop-down menu
Country of Legal Permanent Residence	<p>Country of lawful permanent residence. The USCIS does not consider a non immigrant residing in the US a permanent resident.</p> <p>LegalResidenceCountryCode in the Campus DataLink.</p>	Yes	Optional	Text	Drop-down menu
Gender	<p>The individual's gender.</p> <p>Modifying this field generates a "Update Personal Information" (F-1) or an "Update Biographical Information" (J-1) event.</p> <p>Gender in the Campus DataLink.</p>	Yes	Required	Text	Drop-down menu

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Tax ID	<p>Individual Taxpayer Identification Number (ITIN) as assigned by the US Internal Revenue Service (IRS). This information is sent to SEVIS in the Create Student event except when ISSM is running in PFS Mode.</p> <p>TaxID in the Campus DataLink.</p>	Yes	Optional	Text	9 characters
Social Security Number	<p>The individual's Social Security Number. The US Government often assigns temporary "999" Social Security Numbers to new visitors, giving them a permanent number when they receive employment authorization. Once a permanent number is assigned, the temporary number is assigned to a new individual. Consequently, "999" Social Security Numbers should not be used. Modifying this field generates an "Update Personal Information" (F-1) event. This information is sent to SEVIS in the Create Student and Update Personal Information events except when ISSM is running in PFS Mode.</p> <p>SSN in the Campus DataLink.</p>	Yes	Optional	Text	9 characters

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Driver's License Number	The individual's Driver's License Number. This information is sent to SEVIS in the Create Student and Update Personal Information events except when ISSM is running in PFS Mode. LicNumber in the Campus DataLink.	Yes	Optional	Text	15 characters
Driver's License State	The state that issued the individual's Driver's License. This information is sent to SEVIS in the Create Student and Update Personal Information events except when ISSM is running in PFS Mode. LicState in the Campus DataLink.	Yes	Optional	Text	Drop-down menu

ISSM settings

The contents of the ISSM Settings section are pertinent only to ISSM features and workflow processes. They are not SEVIS-reportable, and they are not used to populate any forms. For optimal use of the application, they should nevertheless be completely populated.

Note

These fields are Not Sevis-reportable and changes to them do not trigger SEVIS events

Field Name	Description
Campus ID	<p>The individual's Campus ID number. Also, the unique identifier for ISSM records. Since this value is used as the primary identifier during the Campus DataLink, the real Campus ID and the ISSM Campus ID should be the same. Depending on whether the record is for a student, scholar or employee, this value may be drawn from the Registrar's mainframe or from the HR, or Payroll, or Personnel mainframe. Limited to 20 characters.</p> <p>To avoid complications with the Campus DataLink extraction process, this field should not be changed once it has been set. As such, it may be advisable to refrain from assigning Campus ID values to ISSM records until the individual(s) in question have their "real" Campus ID. Similarly, "dummy" identifiers should not be used, either.</p> <p>CampusId in the Campus DataLink.</p>
Admissions ID	<p>The unique identifier used by the school's admissions system. At some schools, the admissions office issues an initial ID to students. Then, when they arrive on campus, campus ID numbers are issued.</p> <p>Note: This field is limited to 20 characters. It is not the same as the 11-digit I-94 Admission Number, which is located on the Forms Tab.</p> <p>Adm_Id in the Campus DataLink.</p>

Field Name	Description
Database Status	<p>The record’s status within ISSM. The available choices are Active, Archived, Terminated, or Deleted. While schools may use their own definitions to assign a status to a given record, the typical Database Status definitions are listed below:</p> <p>Active – Records that are accessed on an ongoing basis. Examples include prospective and current students and scholars (including those engaged in authorized off-campus employment). SEVIS-reportable J-1 and F-1 records should have this status.</p> <p>Archived – Records that are no longer used. Examples include students who have graduated, finished OPT, or who have left the United States. Schools should establish policies for determining the point at which records are archived.</p> <p>Deleted – Records that were created in error. Examples include records that were accidentally included in the Campus DataLink XML file and do not need to be in ISSM.</p> <p>Terminated –Records that left “Active” status for reasons other than graduation. Withdrawals, expulsions, or students who left the school under any other unusual circumstances are typically marked as “Terminated.”</p>
Department	<p>ISSM records are “owned” by a department. Depending upon business processes, this value may be changed to transfer control of the record from one department to the other. Refer to “Campuses and Departments” for more information on setting up departments.</p> <p>DepartmentOwnerId in the Campus DataLink.</p>
DataLink Active	<p>Select the check box to make the record DataLink Active. DataLink Active records are updated by the Campus DataLink utility using data from the school’s data system.</p>
E-mail Alerts Suppressed	<p>When the check box is selected, e-mail alerts are not sent to the individual. When the check box is not selected, the individual receives e-mail alerts applicable to him/her. Refer to “Configuring e-mail alerts” on how to configure e-mail alerts.</p>

7 Address Tab

This chapter includes information on the various fields available on the Address tab.

- [“Introduction” on page 7-1](#)
- [“Contents of the Address tab” on page 7-2](#)

Introduction

ISSM stores the address types listed below for all records:

Address Type	Description
Local	The individual’s Local (US) residence. Each record can only have one Local (US) address.
Permanent	The individual’s Permanent (Foreign) address. Each record can only have one Permanent (Foreign) address.
Mailing	Individuals living in apartments or in on-campus housing may have P.O. boxes or mailing addresses that differ from their place of residence. In these cases, the mailing address should be listed here. SEVIS only tracks the Local (US) and Permanent (Foreign) addresses of F-1 and J-1 individuals. It does not accept P.O. boxes or mailing-only addresses as a valid Local Address; the local address in SEVIS must refer to the individual’s physical residence. Each record can only have one Mailing address.
Alternate	Any other relevant address for the individual, such as a business address or emergency contact information. There is no limit to the number of Alternate addresses that ISSM can store in a given record.
Emergency	An Emergency address of the individual who can be contacted in case of any emergency. There is no limit to the number of Emergency addresses that ISSM can store in a given record.

Fields with their names written in boldface text are used with the Campus DataLink.

Modifying the Address fields (Address Line 1 or Address Line 2, City, State, Zip Code, Zip Routing Code, Province) of a “Local (US)” or “Permanent (Foreign)” address in a SEVIS - Active or SEVIS - Pending record will generate a “Update Personal Information” (F-1) or “Update Biographical Information” (J-1) event. Phone numbers are not SEVIS-reportable.

**Note**

The user should select **Cancel** to exit the record without making any changes when editing an Address record.

Contents of the Address tab

The various fields of the Address tab are described in the table below:

Field Name	Description	Triggers		Limits
		SEVIS Events?	SEVIS	
Address Type	Chooses between “Alternate” and “Emergency” addresses. The Address Type for “Local (US)” and “Permanent (Foreign)” addresses cannot be changed.	No	Non-SEVIS	Drop-down menu
Emergency Contact Person	The name of an emergency contact, if applicable.	No	Non-SEVIS	50 characters
Alternate Address Type	Used to further define the alternate address.	No	Non-SEVIS	Drop-down menu
Address Line 1	The first line of the street address (ex. 123 Main Street). USAddr1, FrnAddr1, or MailingAddr1 in the Campus DataLink. Note: As of SEVIS 6.15, SEVIS will no longer require the local address to be sent when an exchange visitor record is created. The Address Line 1, City, State, and Postal/Zip Code field are no longer required fields for a local address. However, if any of these address fields are filled in, then the remaining address fields too need to be filled.	Yes	Required	60 characters
Address Line 2	The second line of the street address (ex. Apartment 1). USAddr2, FrnAddr2, or MailingAddr2 in the Campus DataLink.	Yes	Optional	60 characters

Field Name	Description	Triggers		
		SEVIS Events?	SEVIS	Limits
City	The city used in the address. USCity, FrnCity, or MailingCity in the Campus DataLink.	Yes	Optional	60 characters
State	The state used in the address. USState or MailingState in the Campus DataLink.	Yes	Optional	2 characters
Province	The province of the address, if applicable. This field will only appear in international addresses. FrnProvince or MailingProvince in the Campus DataLink.	Yes	Optional	30 characters
Postal Code/Zip	The first 5 digits of the ZIP code used in the address. USPostalCode, FrnPostalCode, or MailingPostalCode in the Campus DataLink.	Yes	Required	5 characters
Country	The address' country. Modifying this field generates a "Update Personal Information" (F-1) event. FrnCountryCode or MailingCountry in the Campus DataLink.	Yes	Required	Drop-down menu
Phone 1, Type	A phone number at the address. The type of the phone number (home, mobile, etc.) can be selected. There can be up to three phone numbers per address. Phone 1: USPhone1 or MailingPhone1 in the Campus DataLink. Type: USPhoneType1 or MailingPhoneType1 in the Campus DataLink.	No	Non-SEVIS	20 characters

Field Name	Description	Triggers		
		SEVIS Events?	SEVIS	Limits
Phone 2, Type	A phone number at the address. The type of the phone number (home, cell, etc.) can be selected. There can be up to three phone numbers per address.	No	Non-SEVIS	20 characters
Phone 3, Type	A phone number at the address. The type of the phone number (home, cell, etc.) can be selected. There can be up to three phone numbers per address.	No	Non-SEVIS	20 characters
Fax Number	A fax number at the address.	No	Non-SEVIS	50 characters
Explanation Code	A 2-digit code to explain the Address override, if any.	No	Optional	Drop-down menu
Explanation Remarks	Text to explain the reasons for Address override.	No	Optional	500 characters
Current Address	When checked, notes whether the selected address is the individual's "current" address.	No	Non-SEVIS	N/A

8 E-Mail Address Tab



This chapter includes information on the various fields available on the E-Mail Address tab.

- [“Introduction” on page 8-1](#)
- [“Contents of the E-Mail Address tab” on page 8-2](#)

Introduction



ISSM can store several e-mail addresses. Each e-mail address can be categorized under a type, for example, *Work* or *Personal*, and users can specify different e-mail types.

Fields with their names written in boldface text are used with the Campus DataLink.

Modifying the **E-mail Address** field which corresponds to the e-mail address type specified in the **SEVIS E-mail - Address Type** setting in the Configure Application Settings in a SEVIS - Active or SEVIS - Pending record will generate an “Update Personal Information” (F-1) event.



 **Note**

When editing an e-mail address, to close the record without making any changes, select **Cancel**. Clicking **Save** on the record which corresponds to the e-mail address type selected in the **SEVIS E-mail - Address Type** setting in Configure Application Settings will also generate an Update Personal Information Event. ■

Contents of the E-Mail Address tab

The various fields of the E-Mail Address tab are described in the table below:

Field Name	Description	Triggers		
		SEVIS Events?	SEVIS	Limits
E-mail Address Type	<p>Specifies the category or type of e-mail address that this is. For example, <i>Work</i> or <i>Personal</i> e-mail address.</p> <p>Schools can add their own values to be included in the E-Mail Address Type drop-down menu by using the Maintain Select Box Values option of the Enterprise Manager.</p>	No	Non-SEVIS	Drop-down menu
E-mail Address	<p>A valid e-mail address. To send e-mail to an individual, click his/her e-mail address.</p> <p>USEMail or MailingEMail in the Campus DataLink.</p> <p>E-mail Address will trigger an event if the PFS setting is set to <i>Send to SEVIS</i>, and if the e-mail being updated matches the e-mail address type selected in the SEVIS E-mail - Address Type setting in Configure Application Settings. See the <i>ISSM Technical Guide</i> and the <i>User Guide</i> for more information about PFS Mode.</p>	Yes	Optional	255 characters
Notes	<p>Any notes, instructions, or comments associated with this e-mail address.</p>	No	Non-SEVIS	500 characters

9 Dependents Tab

This chapter includes information about the various fields available on the Dependents tab.

- [“Adding a dependent to a student’s record” on page 9-1](#)
- [“Contents of the Dependents tab” on page 9-1](#)

Adding a dependent to a student’s record

After a Change Educational Level event occurs, when you add a dependent to a student’s record, an Add New Dependent event is triggered for both the SEVIS-Active profile and the SEVIS-Initial profile. However, at the time of this release, you cannot upload both events to SEVIS. If you do, SEVIS views this as two new dependents (instead of just one) and each is issued a different SEVIS ID. Therefore, suppress one of the Add New Dependent events. Which event you suppress depends on the student’s situation. For example:

- If the dependent is already in the United States: Approve the Add Dependent - Active event and suppress the Add New Dependent - Initial event.
- If the dependent is not in the United States yet, but will be when the student begins the next program: Approve the Add Dependent - Initial event and suppress the Add Dependent - Active event.

Note

See the [“F & M SEVIS Events”](#) chapter in this manual for additional information about the Change Educational Level event and the Add New Dependent event. ■

Fields with their names written in boldface text are used with the Campus DataLink.

Modifying the Address fields (Address Line 1 or Address Line 2, City, State, Zip Code, Zip Routing Code, Province) of a “Local (US)” or “Permanent (Foreign)” address in a SEVIS - Active or SEVIS - Pending record will generate a “Update Personal Information” (F-1) or “Update Biographical Information” (J-1) event. Phone numbers and e-mail addresses are not SEVIS-reportable.

Contents of the Dependents tab

The various fields of the dependents tab are described in the table below

Dependent

The names of fields used with the Campus DataLink are written in boldface text:

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
SEVIS ID	The dependent's SEVIS ID. This value is generated during the "Add New Dependent" (F-1 or J-1) event and is automatically inserted in dependent record.	No	Required for "Update" events, but not for "Create" events.	Text	11 Characters
Campus ID	A unique ID stored for dependents in the campus administrative system. Each individual's dependents must have Campus ID values that are distinct from each other. This value must be provided to update the dependent's information with the Campus DataLink.	No	Non-SEVIS	Text	20 Characters

(Dependent) campusId in the Campus DataLink.

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Status	<p>The dependent's Status. Dependent Status functions in the same manner as Profile Status for parent records: SEVIS - Active, SEVIS - Pending, Active, End Status, Pending, and Terminated.</p> <p>Toggling the dependent's status from a non-SEVIS status to SEVIS - Active or SEVIS - Pending generates an "Add New Dependent" event (F-1 or J-1). Changing the status back to a non-SEVIS status generates a Terminate Dependent event (F-1 or J-1).</p> <p>If you set the status of a terminated dependent back to SEVIS - Pending or SEVIS - Active, ISSM will generate a Reactivate Dependent event (F-1 or J-1).</p> <p>Changing this field from SEVIS - Active to End Status for J-2 dependents generates a Dependent - EndStatus event.</p> <p>Changing this field to Cancelled generates a Cancel Dependent event (F-1 or J-1).</p> <p>DependentStatus in the Campus DataLink.</p>	Yes	Required for event generation; not reported to SEVIS.	Text	Drop-down menu

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Immigration Status	The dependent's immigration (I-94) status: F-2, J-2, etc. Modifying this field generates an Update Dependent Personal Information (F-1) or Dependent - End (J-1) event. (Dependent) VisaType in the Campus DataLink.	Yes	Required	Text	Drop-down menu

Biographical information

The following table describes the various fields available in the Biographical Information section:

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Surname/Primary Name	The dependent's last name. Modifying this field generates an "Update Dependent Personal Information" (F-1) or "Dependent - End" (J-1) event. (Dependent) "LastName" in the Campus DataLink.	Yes	Required	Text	40 Characters
First/Given Name	The dependent's first name. Modifying this field generates an "Update Dependent Personal Information" (F-1) or "Dependent - End" (J-1) event. (Dependent) FirstName in the Campus DataLink.	Yes	Required	Text	40 Characters

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Middle Name	The dependent's Middle name. Modifying this field generates an "Update Dependent Personal Information" (F-1) or "Dependent - End" (J-1) event. (Dependent) MiddleName in the Campus DataLink.	Yes	Required	Text	40 Characters
Suffix	The dependent's name suffix. Modifying this field generates an "Update Dependent Personal Information" (F-1) or "Dependent - End" (J-1) event. (Dependent) NameSuffix in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
Passport Primary Name	Primary name as printed in passport. PassportPrimaryName in the Campus DataLink.	Yes	Optional	Text	40 characters
Passport Secondary Name	Secondary name as printed in passport. PassportSecondaryName in the Campus DataLink.	Yes	Optional	Text	80 characters
MRZ Display	The individual's name as it appears in the Machine Readable Zone (MRZ) of the passport. This field is automatically populated when the individual's record is saved and is a read-only field.	No	Optional	--	--

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Preferred Surname/ Primary Name	Preferred Last Name (if it exists). PreferredLastName in the Campus DataLink.	No	Optional	Text	40 characters
Preferred Middle Name	Preferred Middle Name (if it exists). PreferredMiddleName in the Campus DataLink.	No	Optional	Text	40 characters
Preferred First/Given Name	Preferred First Name (if it exists). PreferredFirstName in the Campus DataLink.	No	Optional	Text	40 characters

General information

The following table describes the various fields available in the General Information section:

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Gender	The dependent's gender. Modifying this field generates an "Update Dependent Personal Information" (F-1) or Dependent - End (J-1) event. (Dependent) Gender in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
Relationship	The dependent's relationship to the individual. SEVIS only allows dependent relationships of Child or Spouse. Modifying this field generates an Update Dependent Personal Information (F-1) or Dependent - End (J-1) event. Relationship in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
Date of Birth	The dependent's date of birth. Modifying this field generates an Update Dependent Personal Information (F-1) or Dependent - End (J-1) event. (Dependent) BirthDate in the Campus DataLink.	Yes	Optional	Date	mm/dd/yyyy

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Country of Birth	The dependent's country of birth. Modifying this field generates an Update Dependent Personal Information (F-1) or Dependent - End (J-1) event. (Dependent) BirthCountryCode in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
City of Birth	The dependent's city of birth. Modifying this field generates an Update Dependent Personal Information (F-1) or Dependent - End (J-1) event. (Dependent) BirthCity in the Campus DataLink.	Yes	Optional	Text	50 Characters
Email Address	The dependent's email address. When adding or editing the dependents' email address, the Add Dependent event, or Edit Dependent event will be triggered only if the profile status of the dependent is 'SEVIS – Pending' or 'SEVIS – Active'.	Yes	Optional	Text	60 characters

Citizenship information

The following table describes the various fields available in the Citizenship Information section:

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Country of Citizenship	The dependent's country of citizenship. Although the SEVIS ICD lists this field as optional, it is required for EV dependents. Modifying this field generates an Update Dependent Personal Information (F-1) or Dependent - End (J-1) event. (Dependent) CitizenshipCountryCode in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
Country of Permanent Residence	The dependent's country of permanent residence. Modifying this field generates an "Dependent - End" event for J-2 dependents. (Dependent) PermanentResidenceCountryCode in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
Remarks	General Remarks about the dependent. Information entered in this field is submitted to SEVIS during the Update Dependent Personal Information (F-1) or Dependent - End (J-1) events. (Dependent) Remarks in the Campus DataLink.	Yes	Optional	Text	200 Characters

10 Profile Tab

This chapter includes information on the various fields available on the Profile tab.

- [“Introduction” on page 10-2](#)
- [“Basic profile data” on page 10-3](#)
- [“Insurance” on page 10-8](#)
- [“SEVIS reportable information” on page 10-9](#)
- [“Open doors information” on page 10-11](#)
- [“Academic information” on page 10-14](#)
- [“I-20 information” on page 10-16](#)
- [“Expenses information \(I-20\)” on page 10-18](#)
- [“Funding information \(I-20\)” on page 10-21](#)
- [“DS-2019 information” on page 10-24](#)
- [“Host Family/Boarding School Information” on page 10-25](#)
- [“Position in home country” on page 10-27](#)
- [“Site of activity” on page 10-28](#)
- [“Funding information \(DS-2019\)” on page 10-30](#)
- [“Current US employment” on page 10-34](#)
- [“Appointment data” on page 10-35](#)
- [“Education” on page 10-38](#)
- [“Prevailing wage” on page 10-40](#)
- [“LCA \(labor condition application for H-1B non immigrants\)” on page 10-40](#)
- [“Other documents” on page 10-41](#)
- [“I-129 \(petition for a nonimmigrant worker\)” on page 10-42](#)
- [“Training/Internship Placement Plan Fields” on page 10-42](#)

Introduction

In addition to **Profile Type**, **Profile SubType**, and **Profile Status**, there are additional fields in the Record Navigator's **Profile** tab that can be filled in to give a more accurate portrait of an individual's profile. They are listed in the tables below.

The fields displayed in the Profile tab vary by **Profile Type** and **Profile SubType**. As shown below, the combination of **Profile Type** and **Profile SubType** determines what fields are displayed in the **Profile** tab.

Except as noted, the names of fields used with the Campus DataLink are written in boldface text.

Profile Type	Profile SubType	Information Displayed
F-1	All	Basic Profile Data, Academic Information, Open Doors Information, SEVIS Reportable Information, I-20 Information, Expenses Information, Funding Information, Insurance.
J-1	Student	Basic Profile Data, Academic Information, Open Doors Information, DS-2019 Information, Position in Home Country, Site of Activity, Funding Information, Insurance.
J-1	Scholar	Basic Profile Data, DS-2019 Information, Position in Home Country, Site of Activity, Funding Information, Appointment Data, Current US Employment, Education, Insurance, Academic Information, Open Doors Information.
H-1	Student	Basic Profile Data, Academic Information, Open Doors Information, Insurance.
H-1	Scholar	Basic Profile Data, Appointment Data, Current US Employment, Education, Prevailing Wage, LCA, Other Documents, I-129, Insurance, Academic Information, Open Doors Information.
H-1	Other	Basic Profile Data, Appointment Data, Current US Employment, Education Prevailing Wage, LCA, Other Documents, I-129, Academic Information.

Basic profile data

The following fields are visible, regardless of an individual's **Profile Type** or **Profile SubType**:

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Profile Status	<p>The Profile Status as defined in “Profiles and How They Work”</p> <p>F-1 Records: Setting the Profile Status to SEVIS - Active or SEVIS - Pending will trigger a “Create Student” event. Setting the Profile Status from a SEVIS status to a non-SEVIS status will trigger a “Terminate Student” event. Setting the Profile Status from a SEVIS status to Complete will trigger a “Complete Program” event.</p> <p>J-1 Records: Changing the field from SEVIS - Pending to SEVIS - Active generates a “Validate” event. Changing the value from SEVIS - Active or SEVIS - Pending to Complete generates an “Status - End” event. Changing the value from SEVIS - Active or SEVIS - Pending to Terminated generates a “Status - Terminate” event.</p> <p>ProfileStatus in the Campus DataLink.</p>	Yes	Non-SEVIS	Text	Drop-down values only
Profile SubStatus	<p>This field offers additional status information for an individual.</p> <p>The default value is blank. The other drop-down menu values are “Change of Status”, “Deactivated”, “Reinstatement-Pending”, and “Transfer-Pending”.</p> <p>Additional values can be included in the drop-down menu using the Maintain Select Box Values option of the Enterprise Manager.</p>	No	Non-SEVIS	NVAR CHAR	Drop-down values only.

Field Name	Description	Triggers SEVIS Events?		Data Type	Limits
		SEVIS	SEVIS		
Current Profile	This field marks a profile as the “current” profile. Refer to “Profiles and How They Work” for an explanation of how current and non-current profiles relate to each other. Each record can only have one current profile.	No	Non-SEVIS	Check box	N/A
Subtype If Other	Offers additional information about an individual’s Profile SubType when it has been set to “Other.” Default values are “Physician” and “Staff,” but the contents of the drop-down menu can be modified with the Enterprise Manager. ProfileSubTypeIfOther in the Campus DataLink.	No	Non-SEVIS	Text	Drop-down menu
Visa Sponsorship	This drop-down menu contains two values. “Self” indicates that the school is responsible for immigration processing, while “Third-Party” indicates that another school or organization, such as IIE or LASPAU, is responsible for immigration processing. VisaSponsorship in the Campus DataLink.	No	Non-SEVIS	Text	Drop-down menu
Visa Sponsor	Lists the name of the sponsoring organization when “Visa Sponsorship” has been set to “Third-Party”. VisaSponsor in the Campus DataLink.	No	Non-SEVIS	Text	50 characters

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Profile Start Date	<p>F-1 Records: The reporting date in Item 5 of the I-20. Per SEVIS requirements, this date must be tomorrow's date or later when it is used with the "Create Student" event. Pushing this field into the future will trigger a "Defer Attendance" event.</p> <p>J-1 Records: The beginning validity date in Item 3 of the DS-2019 form. Per SEVIS requirements, this date must be tomorrow's date or later when it is used with the "Create Exchange Visitor" event. If it is not, enter tomorrow's date in this field and enter the program start date in the "EV Initial Program Date" field. Modifying this value in SEVIS - Active records generates an "Program - Amend" event.</p> <p>Other Visas: The beginning validity date on the USCIS form (I-129, etc.) used to obtain an immigration status. The "Next Session Start Date" field refers to the start date of the next smasher, and is not the same as the Profile End Date.</p> <p>ProfileStartDate in the Campus DataLink.</p>	Yes	Required	Date	mm/dd/yyyy

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Profile End Date	<p>F-1 Records: The expected “Completion of Studies” date in Item 5 of the I-20 form. Setting this field to a later date generates a “Extend Program” event.</p> <p>J-1 Records: The ending validity date in Item 3 of the DS-2019 form. Moving this value to a later date generates an “Program - Extension” event. Moving this value to an earlier date generates an “Program - Amend” event.</p> <p>Other Visas: The ending validity date on the USCIS form (I-129, etc.) used to obtain an immigration status.</p> <p>The “Current Session End Date” field refers to the end date of the current smasher, and is not the same as the Profile End Date.</p> <p>ProfileEndDate in the Campus DataLink.</p>	Yes	Required	Date	mm/dd/yyyy
EV Initial Program Date	<p>The beginning validity date in Item 3 of the DS-2019 form.</p> <p>EVInitialProgramDate in the Campus DataLink.</p>	No	Non-SEVIS	Date	mm/dd/yyyy

Insurance

The **Insurance** fields store insurance information for the selected individual. Insurance fields are not SEVIS-reportable; changes to them will not trigger SEVIS events:

Field Name	Description	Data Type	Limits
Will the individual be eligible for benefits?	When checked, indicates that insurance coverage will be provided for the individual.	Check box	N/A
Describe	Describes nature of the insurance (health, dental, etc.).	Text	50 characters

SEVIS reportable information

The following table lists the contents of the **SEVIS Reportable Information** section of the **Profile** tab. The names of Campus DataLink fields are written in boldface text:

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Full-Time Status	Enrollment status for the student. In the case of F-1 and M-1 students, this field indicates whether the student is enrolled in a full course of study. Switching the status to “Full-Time” triggers a “Resume Full Course of Study.” Switching this field from “Full-Time” triggers a “Authorize Drop Below Full Course” event.	Yes	Required	Drop-down menu	N/A

SEVIS views the Full-Time Status status as a binary value; either a student is enrolled full-time or he/she is not. There may be cases where a student is full-time within SEVIS, but does not meet the school’s requirements for full-time enrollment. In these cases, the school should defer to the SEVIS status, since this is a SEVIS-reportable field.

ISSM stores four values for the Full-Time Status: Full-Time, Part-Time (Approved), Part-Time (Not-Approved), and Unknown. Other than Full-Time, which should be assigned in accordance with SEVIS regulations, the other three fields can be used in the manner that best suits the school’s internal procedures. Also used with the “Create Student” event.

FtPt in the Campus DataLink.

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Current Session End Date	End date for the current term or semester. This field is not the same as the “Profile End Date,” which refers to the last date on which the individual is in his/her Profile Status. Modifying this field will trigger a “Registration” event. CurrentSessionEndDate in the Campus DataLink.	Yes	Required	Date	mm/dd/yyyy
Next Session Start Date	Beginning date of the next term/semester. This field is not the same as the “Profile Start Date,” which refers to the first date on which the individual is in his/her current Profile Status. Modifying this field will trigger a “Registration” event. NextSessionStartDate in the Campus DataLink.	Yes	Required	Date	mm/dd/yyyy
Commuter Student	An F-1 or M-1 student from Canada or Mexico who qualifies as a commuter student under the SEVIS regulations. Used with the “Create Student” event. Commuter in the Campus DataLink.	No	Required	Check box	N/A
Disciplinary Action Taken	Refer to federal regulations governing disciplinary action reports as required by SEVIS regulations. Modifying the “Disciplinary Action” fields generates “Disciplinary Action” SEVIS events.	Yes	Required	Check box	N/A
Date of Disciplinary Action	The date on which disciplinary action was taken. Modifying the “Disciplinary Action” fields generates “Disciplinary Action” SEVIS events.	Yes	Optional	Date	mm/dd/yyyy

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Disciplinary Action Explanation	Remarks about the disciplinary action taken against the individual. Only SEVIS-reportable disciplinary incidents should be entered here. Modifying the “Disciplinary Action” fields generates “Disciplinary Action” SEVIS events.	Yes	Optional	Text	500 characters
SEVIS I-20 Remarks	‘F’ and ‘M’ Students only. Read-only text that displays the most recent set of remarks that were uploaded in an event to SEVIS. For example, if the most recent event uploaded to SEVIS was the Create Student, then the text in that event’s Remarks field displays in this SEVIS I-20 Remarks field.	No	-----	Text	500 characters

Open doors information

The fields listed below store **Open Doors** information for records with a Profile Subtype of student or scholar. Since Open Doors information is different for students than it is for scholars, certain fields will only appear in student or scholar records.

The names of the scholar-only fields are written below in **boldface** text.

The **Open Doors Information** fields are not SEVIS-reportable; changes to them do not trigger SEVIS events.

Note

Open Doors fields are not DataLink fields.

The auto-population business rules associated with the Open Doors Field of Study, Open Doors Level of Study and Open Doors Major Field of Specification fields do not work unless **Include in Open Doors Report** is checked. ■

Field Name	Description	Data Type	Limits
Include in Open Doors Report	When checked, includes data on the individual in “Open Doors,” the annual census of international students in the US	Text	Check box
Open Doors Field of Study	“Open Doors Field of Study” equivalent. When configuring ISSM, go to Main Menu > Enterprise Manager > Maintain Select Box Values, and then click Edit Info next to “Majors” to map the school’s majors to those recognized by Open Doors. <i>When you modify a student’s Major, this field will be auto-populated with the equivalent Open Doors value.</i>	Text	Drop-down menu
Open Doors Enrollment Status	Can be set to Full Time or “Part Time.	Text	Drop-down menu
Open Doors Academic Level	“Open Doors Academic Level” equivalent. When configuring ISSM, go to Main Menu > Enterprise Manager > Maintain Select Box Values, and then click Edit Info next to “Open Doors Academic Level” to map the school’s academic levels to those recognized by Open Doors (Bachelors Junior, Associate 1st Year, Graduate Masters, etc.).	Text	Drop-down menu
Open Doors Level of Study	Open Doors Level of Study equivalent. When configuring ISSM, go to Main Menu > Enterprise Manager > Maintain Select Box Values, and then click Edit Info next to “Education Levels” to map the school’s education levels (e.g., bachelors, masters, doctorate) to those recognized by Open Doors (Bachelors Junior, Graduate Masters, Graduate Doctorate, etc.). <i>Setting a student’s Level of Education will automatically populate this field.</i>	Text	Drop-down menu

Field Name	Description	Data Type	Limits
Open Doors Primary Source of Funds	<p>“Open Doors Primary Source of Funds” equivalent</p> <p>When configuring ISSM, go to Main Menu > Enterprise Manager > Maintain Select Box Values, and then click Edit Info next to “Open Doors Source of Funds” to map the school’s recognized funding sources to those recognized by Open Doors (Home Government/University Current Employment, U.S. Government, etc.).</p>	Text	Drop-down menu
Open Doors Primary Function	Specifies the scholar’s primary function for the purposes of Open Doors reporting: Teaching, Research, Both, Other, Do Not Know.	Text	Drop-down menu
Open Doors Major Field of Specification	Specifies the scholar’s primary field of specification for the purposes of Open Doors reporting. <i>Filling in the Subject/Field Code in a scholar’s record will auto-populate this field.</i>	Text	50 characters

Academic information

The fields listed in the table below store academic information on individuals studying at the school. Since non-students often enroll in classes, this information is displayed in all.

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
College/School	The college or school where the individual is studying, if applicable. CollegeSchool in the Campus DataLink.	No	Non-SEVIS	Text	Drop-down menu
Academic Department	Department where the individual is studying. Primarily used with J-1 records. This list of departments is configured under Enterprise Manager > Maintain Select Box Values, and is different from the list of departments used with International Scholar Dossier. Dept in the Campus DataLink.	No	Non-SEVIS	Text	Drop-down menu
Major	The individual's Major or Subject/Field Code. Used with the "Create Student" & "Create Exchange Visitor" events. Modification of this field generates "Update Program Information" (F-1) or "Program - Edit Subject Field Code" (J-1) events. PrimaryMajor in the Campus DataLink.	Yes	Required	Text	Drop-down menu

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Secondary Major	The individual's Secondary Major, if applicable. Used with the "Create Student" & "Create Exchange Visitor" events. Also used with the "Update Program Information" (F-1) event. SecondaryMajor in the Campus DataLink.	Yes (F-1/M-1)	Optional	Text	Drop-down menu
Minor	The individual's minor, if applicable. Used with the "Create Student" & "Create Exchange Visitor" events. Also used with the "Update Program Information" (F-1) event. Minor in the Campus DataLink.	Yes (F-1/M-1)	Optional	Text	Drop-down menu
Secondary Minor	The individual's secondary minor, if applicable.	No	Optional	Text	Drop-down menu
Degree Sought	If maintaining more detailed degree designations than are permitted in the Level of Education field, select a specific degree here (MBA, MEd, MFA, DDM, etc.). An optional field in the "Create Student" event. DegreeSought in the Campus DataLink.	No	Optional	Text	Drop-down menu

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Level of Education	The individual's level of study (e.g. undergraduate, graduate, etc.). F-1 and SEVIS-Reportable M-1 Records: Used in the "Create Student" event. To change this value in SEVIS - Active F-1 records, the user must update the student's record in the SEVIS Real-Time Interface (RTI). J-1 Records: Changing this value to a "higher" level ("Bachelors" to "Masters," for instance) will generate an "Program - Matriculate" event and/or a "Status - Terminate" event. EduLevel in the Campus DataLink.	Yes	Required	Text	Drop-down menu
If Other, specify	Used to describe any other relevant level of education. Used in the "Create Student" event. To change this event for SEVIS - Active individuals, the user must update the student's record in the SEVIS RTI.	Yes (F-1/M-1)	Optional	Text	Drop-down menu

I-20 information

The table below explains the fields used when creating I-20 forms with ISSM. Advisors who have processed I-20 documents in the past should be familiar with its contents.

The fields listed below are used with the **Create Student** and **F-1 Update Program Information** events

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Academic Term Length	Length of term expressed in months. The values in this list can be set using the Enterprise Manager. Maps to the term length listed in sections 7 and 8 of the SEVIS I-20 form. AcademicTerm in the Campus DataLink.	Yes	Required	Number	No decimals
Length Of Study month(s)	Number of months required for completing the program the student is undertaking. Maps to the length of study listed in section 5 of the SEVIS I-20 form. Modifying this field generates a “Update Program Information” (F-1) event. LengthOfStudy in the Campus DataLink.	Yes	Required	Number	No decimals
English Proficiency Required	When checked, indicates that English proficiency is required. Maps to the “English Proficiency Required” check box in section 6 of the SEVIS I-20 form. Modifying this field generates a “Update Program Information” (F-1) event. EngRequired in the Campus DataLink.	Yes	Required	Check box	N/A

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
English Proficiency Requirements Met	When checked, indicates that English requirements were met. Maps to the “The student has met the required English Proficiency” check box in section 6 of the I-20. Modifying this field generates a “Update Program Information” (F-1) event. EngRequirementsMet in the Campus DataLink.	Yes	Required	Check box	N/A
English Proficiency Not Required Reason	Text field explaining why English proficiency is not required at the school. Maps to the “English Proficiency is NOT required” field in section 6 of the SEVIS I-20 form. Modifying this field generates a “Update Program Information” (F-1) event. EngNotRequiredReason in the Campus DataLink.	Yes	Required	Text	500 characters

Expenses information (I-20)

The following table lists expense information used in the I-20 form.

Note

These fields can be auto-populated using templates configured in the Enterprise Manager (Maintain Select Box Values > F/M Student Expense Manager). The Expenses name is sorted in an alphabetical order. ■

These fields are used in the **Create Student** and **F-1 Update Financial Information** events.

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Tuition	Total amount of tuition expenses that must be paid by the student. Scholarships, fellowships, assistantships, grants, and other awards should not normally be deducted. This field maps to Box 7A of the SEVIS I-20 form. Tuition in the Campus DataLink.	Yes	Required	Number	Numbers only
Living Expenses	Total amount of living expenses that the student will incur. This will typically include housing costs and other cost-of-living expenses. This field maps to box 7B of the SEVIS I-20 form. Modifying this field generates a “Update Financial Information” (F-1) event. LivingExpense in the Campus DataLink.	Yes	Required	Number	Numbers only
Dependent Expenses	Total amount of expenses that the student will incur while supporting dependents. This field maps to box 7C of the SEVIS I-20 form. DependentExp in the Campus DataLink.	Yes	Optional; Required when used.	Number	Numbers only

Field Name	Description	Triggers SEVIS Events?		Data Type	Limits
		SEVIS			
Other Expenses	Any other miscellaneous expenses the student will incur. Generally, each school will decide which expenses are “Living” expenses and which are “Other” expenses. This field maps to box 7D of the SEVIS I-20 form. Modifying this field generates a “Update Financial Information” (F-1) event. OtherExpAmount in the Campus DataLink.	Yes		Number	Numbers only
Other Expenses Description	Text explanation of other expenses student must pay. Do not use ampersand (&) characters in this field. This field maps to the “Other Expense” description box in section 7 of the SEVIS I-20. Modifying this field generates a “Update Financial Information” (F-1) event. OtherExpDesc in the Campus DataLink.	Yes		Text	500 characters
Total Expenses	Automatically totals the contents of the “Expenses” column on the SEVIS I-20 form. Cannot be modified by the user. Per SEVIS regulations, the total amount of funding must exceed the total amount of expenses.	-----	-----	-----	-----

Funding information (I-20)

The following table lists expense information used in the I-20 form. Once entered, this information will be automatically entered in the I-20 form.

The SEVIS-reportable fields in this section are used in the **Create Student** and F-1 **Update Financial Information** events

Field Name	Description	Triggers SEVIS Events?	SEVIS	Limits
Personal Funds	Total amount of personal funds available to the student for paying expenses. Maps to box 9A of the SEVIS I-20 form. Modifying this field generates a “Update Financial Information” (F-1) event. PersonalFund in the Campus DataLink.	Yes	Required	Numbers only
School Funds	Identifies the amount of funding being provided by the school. Maps to box 9B of the SEVIS I-20 form. Modifying this field generates a “Update Financial Information” (F-1) event. SchoolFundAmount in the Campus DataLink.	Yes	Optional; Required when used.	Numbers only
School Funds Description	Describe the school funding. Maps to the “Specify Type” field next to box 9B of the SEVIS I-20 form. Many schools standardize the remarks on their I-20 and DS-2019 forms. In some cases, they may be required to do so by law. Modifying this field generates an “Update Financial Information” (F-1) event. SchoolFundDesc in the Campus DataLink.	Yes	Optional; Required when used.	500 character text string.

Field Name	Description	Triggers SEVIS		
		Events?	SEVIS	Limits
Other Funds	Identifies any funding provided by another source. Maps to box 9C of the SEVIS I-20 form. Modifying this field generates an “Update Financial Information” (F-1) event. OtherFundAmount in the Campus DataLink.	Yes	Optional; Required when used.	Numbers only
Other Funds Description	Provides the name of other sources of funding and/or the nature of the funding. Maps to the “Specify Type” field next to box 9C of the SEVIS I-20 form. Many schools standardize the remarks on their I-20 and DS-2019 forms. In some cases, they may be required to do so by law. Modifying this field generates a “Update Financial Information” (F-1) event. OtherFundDesc in the Campus DataLink.	Yes	Optional; Required when used.	500 character text string.
Employment Funds	Total funds available to the student through on-campus employment. Maps to box 9D of the SEVIS I-20 form. Modifying this field generates a “Update Financial Information” (F-1) event. EmploymentFund in the Campus DataLink.	Yes	Optional; Required when used.	Numbers only
Employment Funds Description	Records the name of the employing department or office and/or describes the nature of the employment. This field is not required, and will not be sent to SEVIS. Many schools standardize the remarks on their I-20 and DS-2019 forms. In some cases, they may be required to do so by law.	No	Non-SEVIS	500 character text string.

Field Name	Description	Triggers SEVIS Events?	SEVIS	Limits
Remarks	<p>General remarks about funding available to student. Does not necessarily pertain to a specific source of funding. Maps to the Remarks field in section 9 of the SEVIS I-20 form. Many schools standardize the remarks on their I-20 and DS-2019 forms. In some cases, they may be required to do so by law. Modifying this field generates a “Update Financial Information” (F-1) event.</p> <p>FundingRemarks in the Campus DataLink.</p>	Yes	Optional	500 character text string.
Total Funds	<p>Automatically totals the contents of the “Expenses” column. Cannot be modified by the user. Per SEVIS regulations, the total amount of funding must exceed the total amount of expenses.</p>	-----	-----	-----

DS-2019 information

The table below lists the fields used when generating a DS-2019 form. Advisors who have produced DS-2019 documents should be familiar with them.

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Home Country Position Code	The position that the exchange visitor holds in his/her home country. Enter the 3-digit Position Code in the text box or choose a value from the drop-down menu. Modifying this field generates an "Update Biographical Information" (J-1) event.	Yes	Required	Number	Drop-down menu
J Visitor Category	Exchange visitor's program category.	No	Required	Text	Drop-Down menu
Occupation Category Code	If J Visitor Category is set to either Intern or Trainee, you should also select the occupation category code appropriate for the current visitor.	No	Required if J Visitor Category is set to Intern or Trainee	Text	Drop-down menu

Note: On Internet Explorer 10, the Compatibility View must be enabled for this drop-down list to be accessible.

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Subject/ Field Code	SEVIS requires the CIP 2000 code for the EV's field of study. When first installed, ISSM lists the old Department of State (DOS) values. Use the Enterprise Manager to update the codes to the new set of SEVIS CIP codes. ISSM translates the value to the CIP Code just before sending the event to SEVIS. Modifying this field generates an "Program - Edit Subject Field Code" (J-1) event. SubjectFieldCode in the Campus DataLink	Yes	Required	Text	50 characters
Subject/ Field Remarks	Remarks about the Subject/Field. Note: This field is called "Describe Activity or Job" in the DataLink configuration screen and located between the Subject-Field Code and Position Code fields. SFRemarks in the Campus DataLink.	Yes	Non-SEVIS	Text	

Host Family/Boarding School Information

The information in this section of the J-1 Profile stores contact information of the Host Family or Boarding School for the Exchange Visitor. This information is only available for J Visitor Categories equal to Student (Secondary) or Au Pair. Modifying these fields for a SEVIS reportable exchange visitor generates an "Update Biographical Information" (J-1) event.

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Local Community Coordinator Contact First Name	First name of the Local Community Coordinator contact	Yes	Optional	Text	40 characters
Local Community Coordinator Contact Last Name	Last name of the Local Community Coordinator contact	Yes	Optional	Text	40 characters
Residential Address Type	Type of Residential Address for Secondary School Student exchange visitor category only. Values include 'Boarding School' or 'Host Family'. This field will only appear when the J Visitor category is Student (Secondary).	Yes	Optional	Text	Drop-Down menu
Host Family Primary Contact First Name	First Name of Host Family Primary Contact	Yes	Optional	Text	40 characters
Host Family Primary Contact Last Name	Last Name of Host Family Primary Contact	Yes	Optional	Text	40 characters
Host Family Secondary Contact First Name	First Name of Host Family Secondary Contact	Yes	Optional	Text	40 characters
Host Family Secondary Contact Last Name	Last Name of Host Family Secondary Contact	Yes	Optional	Text	40 characters
Phone Number	Phone Number of Host Family contact	Yes	Optional	Text	12 characters; Format is xxx-xxx-xxxx
Phone Ext	Phone Extension of Host Family contact	Yes	Optional	Text	4 characters

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Boarding School Name	Name of Boarding School for Secondary School Students. This field will only appear when the J Visitor category is Student (Secondary) and Residential Address type is Boarding School.	Yes	Optional	Text	60 characters
Boarding School Phone Number	Phone Number of Boarding School. This field will only appear when the J Visitor category is Student (Secondary) and Residential Address type is Boarding School.	Yes	Optional	Text	12 characters; Format is xxx-xxx- xxxx
Boarding School Phone Ext	Phone Extension of Boarding School. This field will only appear when the J Visitor category is Student (Secondary) and Residential Address type is Boarding School.	Yes	Optional	Text	4 characters

Position in home country

The information in this section of the J-1 Profile stores information about the individual's occupation in his/her home country.

The **Position in Home Country** fields are not SEVIS-reportable; changes to them will not generate SEVIS events.

Field Name	Description	Data Type	Limits
Position Title in Home Country	The individual's position held in his/her home country. This field exists for optional school record keeping purposes, only. The "Home Country Position Code" field listed above is the relevant field in terms of SEVIS.	Text	100 characters
Employer or Institution	Name of home country employer or institution. This field exists for optional school record keeping purposes, only.	Text	100 characters
Employer Type	Type of employer in home country (e.g. university, government, etc.). This field exists for optional school record keeping purposes, only.	Text	100 characters
Mail Code	Mail code of employer in home country. This field exists for optional school record keeping purposes, only.	Text	100 characters

Site of activity

This section lists the Site of Activity for the exchange visitor. Multiple sites may be provided. The information used in these fields will populate the SEVIS DS-2019 form.

Site of Activity information is required in the **Create Exchange Visitor** event. Adding a Site of Activity in SEVIS - Active or SEVIS - Pending J-1 records triggers an **Site of Activity - Add** event.

Deleting a Site of Activity in SEVIS - Active or SEVIS - Pending J-1 records generates a **Site of Activity - Delete** event

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Prefill Site Of Activity	Populates the Site of Activity using a template. Use Enterprise Manager > Maintain Select Box Values > Sites of Activity to create and modify Site of Activity templates.	No	Non-SEVIS	Text	Drop-down menu
SOA Type	Used as an indicator on Site of Activity records for exchange visitors who are in the Summer Work Travel (SWT) category and are from a country that is in the list of visa waiver countries.	Yes	Required Note: The SoA Type field will not be visible for exchange visitor records that are not of category 'Summer Work Travel' and/or are not from a visa waiver country.	NVARC HAR	Drop-down menu
Site Of Activity Name	Name of Site of Activity (e.g., Biology Research Laboratory). If a Site of Activity Name is the same as another Site at a different location, each site must use a Site ID. The Site ID uniquely identifies sites with the same Site of Activity Name.	Yes	Required	Text	60 characters
Site ID	A unique ID assigned by SEVIS to a specific Site of Activity. This is used to differentiate Sites of Activity with the same Site of Activity Name.	No	Optional	Text	50 characters
Site Address Line 1	US Street Address of Site of Activity.	Yes	Required	Text	60 characters

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Site Address Line 2	US Street Address of Site of Activity.	Yes	Optional	Text	60 characters
City	City of Site of Activity.	Yes	Required	Text	60 characters
State	State of Site of Activity.	Yes	Required	Text	2 characters
Zip Code (field 1)	Zip code (first 5 digits) of Site of Activity.	Yes	Required	Text	5 characters
Zip Code (field 2)	Zip code (last 4 digits) of Site of Activity.	Yes	Optional	Text	4 characters
Remarks	Remarks related to Site of Activity. Many schools standardize the remarks on their I-20 and DS-2019 forms. In some cases, they may be required to do so by law.	Yes	Optional	Text	500 characters
Explanation Code	A 2-digit code to explain the Address override, if any.	No	Optional	Drop-down menu	Drop-down menu
Explanation Remarks	Text to explain the reasons for Address override.	No	Optional	Text	500 characters

Funding information (DS-2019)

Provides funding information for the exchange visitor. The information used in these fields will populate the SEVIS DS-2019 form. Do not use dollar signs (\$) or decimal points in any of the Funding fields that contain dollar amounts. SEVIS will reject these

fields if they contain non-numeric characters.

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Program Sponsor Funds	Amount of financial support being provided by the Program Sponsor. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an “Update Financial Information” (J-1) event.	Yes	Optional	Number	Numbers only
	EVProgramSponsorFunds in the Campus DataLink.				
Program Sponsor Funds Explanation	Explanation of Program Sponsor funds. This field exists for optional school record keeping purposes only. Many schools standardize the remarks on their I-20 and DS-2019 forms. In some cases, they may be required to do so by law.	No	Non-SEVIS	Text	50 characters
U.S. Government Organization Funds 1	Amount of funding received from a US Government Organization. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an “Update Financial Information” (J-1) event.	Yes	Optional	Number	Numbers only
	EVUSGovtOrgFunds1 in the Campus DataLink.				
Agency 1 Code	US Government Organization code.	Yes	Optional	Text	Drop-down menu
	EVUSGovtOrgCode1 in the Campus DataLink.				

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
U.S. Government Organization Funds 2	Amount of funding received from a second US Government Organization. Numbers only. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an “Update Financial Information” (J-1) event. EVUSGovtOrgFunds2 in the Campus DataLink.	Yes	Optional	Number	Numbers only
Agency 2 Code	US Government Organization code. EVUSGovtOrgCode2 in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
International Org. Funds 1	Amount of funding received from international organization. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an “Update Financial Information” (J-1) event. EVUSGovtOrgFunds1 in the Campus DataLink.	Yes	Optional	Number	Numbers only
Intl. Org. 1 Code	Code associated with the granting international organization type. EVUSGovtOrgCode1 in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
International Org. Funds 2	Amount of funding received from second international organization. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an “Update Financial Information” (J-1) event. EVUSGovtOrgFunds2 in the Campus DataLink.	Yes	Optional	Number	Numbers only

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Intl. Org. 2 Code	Code associated with the granting international organization type. EVUSGovtOrgFunds2 in the Campus DataLink.	Yes	Optional	Text	Drop-down menu
Government Funds	Funds provided by the government of the exchange visitor's country. If amount is entered it must be greater than 1. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an "Update Financial Information" (J-1) event. EVGovtFunds in the Campus DataLink.	Yes	Optional	Number	Numbers only
Government Funds Explanation	Explanation of the source and/or nature of funding received from exchange visitor's government. This field exists for optional school record keeping purposes only.	No	Non-SEVIS	Text	50 characters
Binational Commission Funds	Funding provided by the Binational Commission of the exchange visitor's country. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an "Update Financial Information" (J-1) event. EVBinationalCommission Funds in the Campus DataLink.	Yes	Optional	Number	Numbers only
Binational Commission Funds Explanation	Explanation of the source and/or nature of funding from the exchange visitor's binational commission. This field exists for optional school record keeping purposes only.	No	Non-SEVIS	Text	50 characters

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
Other Org. Funds	Funding provided by other organizations. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an “Update Financial Information” (J-1) event. EVOtherOrgFunds in the Campus DataLink.	Yes	Required	Number	Numbers only
Other Org. Explanation	Explanation of the source and/or nature of funding from other organization(s). This field exists for optional school record keeping purposes only.	Yes	Required	Text	50 characters
Personal Funds	Exchange visitor’s personal and/or family funds. Do not use decimal points or dollar signs (\$) when entering data in this field. Modifying the contents of this field will generate an “Update Financial Information” (J-1) event. EVPersonalFunds in the Campus DataLink.	Yes	Optional	Number	Numbers only
Personal Funds Explanation	Explanation of the source and/or nature of personal and/or family funding. This field exists for optional school record keeping purposes only.	No	Non-SEVIS	Text	50 characters

Current US employment

This section is used for overall advising purposes, storing information about a scholar’s current and concurrent employment by another US institution.

The **Current US Employment** fields are not SEVIS-reportable; changes to them will not trigger SEVIS events

Field Name	Description	Data Type	Limits
Is the scholar currently employed in the US?	When checked, indicates that the individual is currently employed in the US.	Check box	N/A
If So, Employer Name	Name of the individual's current employer.	Text	50 characters
Employer Phone	The employer's phone number.	Text	50 characters
Employer Address	The employer's address.	Text	200 characters
Will the scholar be affiliated with another institution?	When checked, indicates that the scholar will be concurrently affiliated with another institution or company.	Check box	N/A
Will the scholar receive compensation?	When checked, indicates that scholar will receive compensation from the affiliated organization.	Check box	N/A
Affiliate Name	The name of the affiliated organization.	Text	50 characters
Affiliate Contact	The name of the contact at the affiliated organization.	Text	50 characters
Affiliate Address	The affiliated organization's address.	Text	200 characters
Affiliate Phone	The affiliated organization's phone number.	Text	50 characters

Appointment data

The information below is only is displayed for individuals with a **Profile SubType** of **Scholar** or **Other**. It stores appointment data for J-1, H-1, O-1, P-1, TN-1 and PR/I-485 Pending individuals. It includes fields for the scholar/employee's department, contacts, appointment dates, position, and salary information.

The **Appointment Data** fields are not SEVIS-reportable; changes to them will not trigger SEVIS events.

Field Name	Description	Data Type	Limits
Employer Name	The name of the individual's employer. This field should contain the name of the hiring entity, which in most cases will be the name of the school or an affiliated organization. In the case of H-1, O-1, P-1, and TN-1 individuals (and their dependents), information entered here is automatically written into the I-129 form.	Text	Drop-down menu
School Name	Name of school or college within the institution where the scholar will be working (e.g., School of Arts, College of Engineering).	Text	Drop-down menu
Department Name	Name of the hiring department or office (e.g., Physics Department, Office of Information Technology). This department list is also used with International Scholar Dossier, and can be configured under Enterprise Manager > Configure Academic Departments.	Text	Drop-down menu
Faculty Sponsor	The name of the faculty member sponsoring and/or supervising the scholar.	Text	50 characters
Dept. Administrator	The name of the administrative contact in the employing department, office, college, or school responsible for assisting the faculty supervisor with scholar issues.	Text	50 characters
Dept. Administrator	The name of the administrative contact in the employing department, office, college, or school responsible for assisting the faculty supervisor with scholar issues.	Text	50 characters
Department Head	Chairperson of the employing department or office.	Text	50 characters

Field Name	Description	Data Type	Limits
Prospective Start Date	The prospective start date of the appointment. ISSM does not use this value in SEVIS forms. The date in “Profile Start Date” is the value that populates forms.	Date	mm/dd/yyyy
Prospective End Date	Desired end date of the appointment. ISSM does not write this date on any immigration forms. The date in “Profile End Date” is the value that populates forms. Sometimes the “Start” and “End” dates may vary from the “Profile Start Date” and the “Profile End Date,” since actual appointment dates may be longer than the amount of time a person may have left in a given immigration status. For example, a department may appoint a person to a faculty position for three years, while the individual may only have two years left in H-1 status. In this case, the “Profile End Date” would be the two-year date (as that date will be carried over to the I-129 document), while the appointment dates could be entered for the three-year period.	Date	mm/dd/yyyy
Job Title	The position’s title. These values can be set with the Enterprise Manager.	Text	Drop-down menu
Job Title, If Other	If the Job Title is not in the “Job Title” drop-down menu, the title can be entered in this space.	Text	50 characters
Location of Employment	Location where the Scholar works. Some schools may wish to enter the name of a specific office or laboratory in this field. Others may wish to enter a physical location (e.g., Engineering Building, Room 404).	Text	50 characters
Degrees Required for Position	The academic level required for the position (e.g. Ph.D. in Physics, MFA in Sculpture).	Text	100 characters
Post-Degree Experience Required	Lists any post-degree experience required for the position (e.g. Five Years Professional Experience, Nobel Prize, etc.).	Text	100 characters

Field Name	Description	Data Type	Limits
Percentage of Activity in research, teaching, etc.	The percentage of time that will be devoted to research or teaching.	Text	100 characters
Is the position permanent?	When checked, indicates that the appointment is a permanent position.	Check box	N/A
Is the position Full-Time?	When checked, indicates that the appointment is a permanent position.	Check box	N/A
Is the position tenure track?	When checked, indicates that the position is a “tenure track” position.	Check box	N/A
Number of Hours Per Week	The number of hours per week that the individual will be working.	Number	Integers only
Full-Time Salary	The full time position’s annual salary, expressed as an integer. For example, \$40,000.00 per year should be entered as 40000. Do not include decimal points or dollar sign characters (\$) in the field.	Number	Integers only
Full-Time Salary Per	Enter the pay scale if the full-time salary is expressed on a “per hour” or “per week” basis.	Number	100 characters
Part-Time Salary	The part-time position’s annual salary, expressed as an integer. For example, \$25,000.00 per year should be entered as 25000. Do not include decimal points or dollar sign characters (\$) in the field.	Number	Integers only
Part-Time Salary Per	Enter the pay scale if the part-time salary is expressed on a “per hour” or “per week” basis.	Text	100 characters
Is employment less than 6 months?	When checked, indicates that the position is expected to last six months or less.	Check box	N/A
If Yes, is there a possibility stay will be extended?	When checked, indicates that a six-month or shorter position can possibly be extended.	Check box	N/A

Education

The fields outlined in the table below store information regarding a scholar’s education and can be used for overall advising purposes, such as determining which visa classification or immigration status would be most appropriate.

The **Education** fields are not SEVIS-reportable; changes to them will not trigger SEVIS events

Field Name	Description	Data Type	Limits
Is the scholar currently enrolled in a degree program?	When checked, indicates that the individual is currently enrolled in a degree program.	Check box	N/A
Does the scholar have a medical degree?	When checked, indicates that the scholar has a medical degree.	Check box	N/A
Will the scholar be enrolled in classes at our institution?	When checked, indicates that the scholar will be enrolled in classes at the school.	Check box	N/A
List all degrees earned	Use this space to list any degrees the scholar has previously received.	Text	500 characters
Highest Degree Earned	Notes the highest degree the scholar has earned.	Text	50 characters

Prevailing wage

Enter Prevailing Wage information in the fields explained in the following table.

The **Prevailing Wage** fields are not SEVIS-reportable; changes to them will not trigger SEVIS events. None of these fields are DataLink-active.

Field Name	Description	Data Type	Limits
Offered salary	Salary offered to the employee/scholar by the institution. Do not use dollar signs (\$) or decimal points when entering information in this field.	Number	Integers only
Filed on	Date on which the “Prevailing Wage” form was submitted to the state employment agency.	Date	mm/dd/yyyy
Returned on	Date on which the “Prevailing Wage” form was returned to the institution by the state employment agency.	Date	mm/dd/yyyy
Rate	Pay rate as determined by the employment agency.	Number	Integers only
Type	Indicates whether the prevailing wage was determined by state employment agency or through an independent survey.	Text	20 characters

LCA (labor condition application for H-1B non immigrants)

The LCA is also known as Department of Labor (DOL) Form ETA-9035E (web submission) or DOL Form ETA-9035 (facsimile submission). The fields listed in the table below should be populated with information regarding the status of this form.

The **LCA** fields are not SEVIS-reportable; changes to them will not trigger SEVIS events. These are not DataLink-active fields.

Field Name	Description	Data Type	Limits
Filed on	Date on which the LCA was sent to the DOL.	Date	mm/dd/yyyy
Returned on	Date on which the LCA was returned to the institution by the DOL.	Date	mm/dd/yyyy
Status	The status of the filing (e.g. Approved, Rejected, Pending).	Text	20 characters
Control #	The LCA control number.	Text	20 characters

Other documents

The fields explained in the following table contain information about other documents used in the processing of H-1, O-1, P-1 and TN-1 records and dependents.

The **Other Documents** fields are not SEVIS reportable; changes to them will not trigger SEVIS events

Field Name	Description	Data Type	Limits
Empl Support Letter Recd.	When checked, indicates that the employer's support letter (normally sent with the I-129) has been received from the hiring department.	Check box	N/A
Appt Letter Recd.	When checked, indicates that the appointment letter (normally sent with the I-129) has been received from the hiring department.	Check box	N/A
Educ Evaluation	When checked, indicates that education credential evaluation is/ was needed.	Check box	N/A
Educ Evaluation Sent to Recd.	Indicates the educational credential evaluation company to which the information was sent.	Date	50 characters
	Date when was the evaluation was received.	Date	mm/dd/yyyy
Diploma Recd.	When checked, indicates that a copy of the diploma is on file.	Check box	N/A

I-129 (petition for a nonimmigrant worker)

The information listed in the following table is used for case management purposes to note the status of employment status requests made with I-129 forms.

The **I-129 fields** are not SEVIS-reportable; changes to them will not trigger SEVIS events:

Field Name	Description	Data Type	Limits
Filed on	Date on which the I-129 was sent to the Service Center	Date	mm/dd/yyyy
Status	The status of the filing (e.g. Approved, Rejected, Pending).	Text	20 characters
Returned on	The date on which the petition decision was rendered (date of approval on I-797 Approval Notice).	Date	mm/dd/yyyy
Petition Approval #	Adjudication Case Number issued by the Service Center on the Approval Notice.	Text	50 characters

Training/Internship Placement Plan Fields

Provide T/IPP information for exchange visitors. These fields are accessed using the **Add/Edit Tipp** link in the *Site of Activity* section under the Record Navigator's **Profile** tab. The link will be visible for SEVP Code 14, 15 and 1G records. You can also use the Campus DataLink to add T/IPP information.

DS-7002 Participant Information

Field Name	Description	SEVIS	Data Type	Limits
Is IWT	Indicates programs that are exempt from certain T/IPP rules.	Optional	Check box	N/A
E-mail Address	The participant's e-mail address.	Required	Text	320 characters
Field of Study	The participant's field of study or profession.	Required	Text	100 characters
Years of Experience	Years of experience in that field.	Optional	Text	2 characters

Field Name	Description	SEVIS	Data Type	Limits
Type of Degree	Type of degree or certificate.	Required	Date	100 characters
Date Awarded/Expected	The date on which the participant's degree was awarded, or the date on which the degree is expected to be awarded.	Required	Text	mm/dd/yyyy

T/IPP Sites

These fields are accessed using the **Add New T/IPP Site** button, or the **Edit** button for an existing T/IPP site.

Site of Activity

Field Name	Description	SEVIS	Data Type	Limits
Primary Site	Indicates if this site is the primary T/IPP site.	Optional	Check box	N/A
Site of Activity Name	The name of the T/IPP site.	Required	Text	60 characters
Site Id	The identifier for the T/IPP site.	Optional	Text	50 characters
Site Address Line 1	The first line of the T/IPP site address.	Required	Text	64 characters
Site Address Line 2	The second line of the T/IPP site address.	Optional	Text	64 characters
City	The city in which the T/IPP site is located.	Optional	Text	60 characters
State	The 2-letter indicator for the state in which the T/IPP site is located.	Optional	Drop-down list	2 characters
Zip Code	The 5-digit postal code.	Required	Text	5 characters

Field Name	Description	SEVIS	Data Type	Limits
Explanation Code	<p>2-digit code to explain the Site Address override, if any.</p> <p>Valid codes are:</p> <p>OB - Over-ride campus business address</p> <p>OH - Over-ride campus housing address</p> <p>OM - Over-ride campus mailing address</p> <p>ON - Over-ride new mailing address</p> <p>OO - Over-ride other</p> <p>Note: Over-ride other requires an explanation (limit 200 characters).</p> <p>OP - Over-ride new physical address</p>	Optional	Drop-down list	2 characters
Explanation Remarks	Text to explain the address override code.	Optional	Text	200 characters
Remarks	Any other remarks for this site.	Optional	Text	500 characters

Organization Information

Field Name	Description	SEVIS	Data Type	Limits
Employer ID Number	The 9-digit Federal ID or Tax ID for the employer.	Required	Text	9 characters
No Of FT Employees	The number of full-time employees in the organization.	Required	Text	9 characters

Field Name	Description	SEVIS	Data Type	Limits
Annual Revenue	The annual revenue amount for the organization. Values in the drop-down list are: Annual Revenue:\$0-\$3 Million Annual Revenue:\$3-\$10 Million Annual Revenue:\$10-\$25 Million Annual Revenue:\$25 Million or More	Required	Drop-down list	--
Web URL	The URL for the organization's website.	Required	Text	250 characters
Worker's Comp Policy	Indicates whether there is a compensation policy in place for workers.	Required	Drop-down list	--
If Yes, Carrier	The description of the compensation carrier.	Required	Text	100 characters
Worker's Comp Policy for EV	Indicates whether there is a compensation policy in place for exchange visitors. Values in the list are: No, but equivalent coverage No, exempt Yes	Required	Drop-down list	--
EV Hours Per Week	The working hours per week for the exchange visitor.	Required	Text	3 characters
Stipend	Indicates whether a stipend is being paid.	Required	Drop-down list	--
Amount	The amount of the stipend paid.	Optional	Text	10 characters

Field Name	Description	SEVIS	Data Type	Limits
Per	How often the stipend is paid out. Values are: Day Hour Month Week Year	Optional	Drop-down list	--
Non-Monetary Compensation Value	If the compensation is non-monetary, this field indicates the value of the non-monetary compensation.	Optional	Text	100 characters

Supervisor Information

Field Name	Description	SEVIS	Data Type	Limits
Last Name	The last name of the exchange visitor's supervisor.	Required	Text	40 characters
Title	The title of the supervisor.	Required	Text	100 characters
First Name	The supervisor's first name.	Required	Text	40 characters
E-mail Address	The supervisor's e-mail address.	Required	Text	320 characters
Fax Number	The fax number for the supervisor.	Optional	Text	10 characters
Phone Number	The contact number for the supervisor.	Required	Text	10 characters
ext	The extension for the phone number.	Optional	Text	4 characters

Signature

Field Name	Description	SEVIS	Data Type	Limits
Official User Name	The official user name.	Optional	Text	10 characters
EV Signature Date	The date of the exchange visitor's signature.	Optional	Date	mm/dd/yyyy
Official Signature Date	The date of the official's signature.	Optional	Date	mm/dd/yyyy

Tipp Phases

These fields are accessed using the **Add/Edit T/IPP Phase** button, or the **Edit Info** button for an existing T/IPP Phase.

Basic Information

Field Name	Description	SEVIS	Data Type	Limits
Program Start Date	Automatically populated with the T/IPP dates.	--	--	--
Program End Date	Automatically populated with the T/IPP dates.	--	--	--
Phase Name	The name of the T/IPP phase.	Required	Text	100
Start Date	The date on which the phase commences.	Required	Date	mm/dd/yyyy
End Date	The date the phase ends.	Required	Date	mm/dd/yyyy
Phase ID	An identifier for the T/IPP phase.	Optional	Text	22
Training/Internship Field	The area or field under which the training/internship can be categorized.	Required	Text	100

Supervisor Information

Field Name	Description	SEVIS	Data Type	Limits
Last Name	The last name of the person who will be supervising the trainee/ intern.	Required	Text	40 characters
Title	The supervisor's title.	Required	Text	100 characters
First Name	The supervisor's first name.	Required	Text	40 characters
E-mail Address	The supervisor's e-mail address.	Required	Text	320 characters
Middle Initial	The middle name initial of the supervisor.	Optional	Text	1 character
Phone Number	The contact number for the supervisor.	Required	Text	10 characters
ext.	The desk phone extension number for the supervisor.	Required	Text	4 characters
Signature Date	The date of the supervisor's signature.	Optional	Text	10 characters
EV Role	The role that the exchange visitor will have during the training/ internship phase.	Required	Text	3000 characters
Goals And Objectives	The objectives and targets of this phase.	Required	Text	3000 characters
Supervisors And Qualifications	A description of the supervisor for this phase and the associated qualifications for that role.	Required	Text	3000 characters
Cultural Activities	A description of any cultural activities that will be a part of this phase.	Required	Text	3000 characters
Skills or Techniques that will be learned	A description of any cultural activities that will be a part of this phase.	Required	Text	3000 characters
Teaching Method	A description of the teaching methods that will be used during this phase.	Required	Text	3000 characters

Field Name	Description	SEVIS	Data Type	Limits
How Will the trainee/ intern's acquisition of new skills and competencies be measured	Details of how competencies gained during this phase will be evaluated.	Required	Text	3000 characters
Additional Phase Remarks	Any other additional remarks pertaining to this phase.	Optional	Text	3000 characters

11 Work Auths Tab

This chapter includes information on the various fields available on the Work Auths tab.

- [“Introduction” on page 11-1](#)
- [“Current and historical work authorization information” on page 11-2](#)
- [“Current profile information” on page 11-2](#)
- [“Basic employment information” on page 11-3](#)
- [“STEM extension information” on page 11-5](#)
- [“Cap gap extension information” on page 11-6](#)
- [“Academic advisor information” on page 11-7](#)
- [“Employer information” on page 11-8](#)

Introduction

The tables below contain information used when processing Work Authorization Information in ISSM. The available work authorization types in ISSM are:

- Optional Practical Training (F/M only)
- Optional Practical Training (F/M Only)-Extension*
- Curricular Practical Training (F only)
- Off-Campus Employment (F only)
- EV Academic Training (J only)
- EV Employment (J only)

*When generating a STEM extension event from the SEVIS Wizard, an additional work authorization record is automatically created for the extension with the type being 'Optional Practical Training (F/M Only)-Extension'. Otherwise, this type is not available to be chosen by the user.

Current and historical work authorization information

Work Authorization records can be displayed under the Current or Historical Work Authorization Information sections. Those records displayed under the Current Work Authorization Information are those work authorizations that are related to the current profile. Those records displayed under the Historical Work Authorization Information are related to profiles that are not current.

Current profile information

The current profile information appears as read-only at the top of the work authorization tab when viewing or adding work authorization records. The profile information displayed in this section is pulled from the individual's profile that is marked as the current profile at the time the work authorization record was created.

Field Name	Description	Work Authorization Type displayed
Profile Type	Current Immigration Status	All
Full Time/ Part Time Status	Enrollment Status	All
Profile State Date	Program Start Date	All
Profile End Date	Program End Date	All
Primary Major	This can also be found in the Academic Information section of the Profile.	All
Secondary Major	This can also be found in the Academic Information section of the Profile.	All
Degree Level	Educational Level (found in the Academic Information section of the Profile)	All
Is STEM Eligible?	Identifies whether the primary or secondary major associated with the student record is eligible for STEM extension	Optional Practical Training

Basic employment information

The fields listed in the Basic Employment section of the Work Authorization record will change based upon the work permission type. The table below describes all fields that can be listed in this section.

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Work Authorization Type	Type of work authorization granted	All Types	Yes	Yes	Text	Drop-down menu; Work Authorization type dropdown options are populated based on profile type
OPT Completion Type	Completion type of OPT requested: Pre Completion OPT or Post Completion OPT	Optional Practical Training	Yes	Yes	Text	Drop-down menu
J Academic Training/Emp	Type of J Work Authorization	EV Academic Training, EV	No	Yes	Text	Drop-down menu
Hours per Week	Hours per week spent on employment	All Type	No	No	Number	Calculated
Start Date	Start Date of Work Authorization	Curricular Practical Training, Off-Campus Employment, EV Academic Training, EV Employment	Yes	Yes	Date	mm/dd/yyyy

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
End Date	End Date of Work Authorization	Curricular Practical Training, Off-Campus Employment, EV Academic Training, EV Employment	Yes	Yes	Date	mm/dd/yyyy
OPT Start Date	Start Date of Optional Practical Training	Optional Practical Training	Yes	Yes	Date	mm/dd/yyyy
OPT End Date	End Date of Optional Practical Training	Optional Practical Training	Yes	Yes	Date	mm/dd/yyyy
Total OPT Authorized	OPT authorization in months	Optional Practical Training, Off-Campus Employment	No	No	Date	mm/dd/yyyy
RTI Request Status*	Status of work authorization request found in RTI: Requested, Pending, Approved, Withdrawn, Cancelled, Denied, Completed	All Types	No	No	Text	Drop-down menu
USCIS Receipt #	Case receipt number related to the work authorization request (provided by the USCIS)	All Types	No	No	Text	20 characters
Course Relevance/ Objectives	Relevance of employment to the student's program	Optional Practical Training, Curricular Practical Training, EV Academic Training	Yes	Yes; Optional	Text	250 characters

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Recommendation	To be used when recommending off-campus Employment; Text should be entered in this field for the following types of off-campus employment: Economic Hardship, International Organization, or Special Student Relief	Off-Campus Employment	Yes	Yes; Optional	Text	250 characters
Student Remarks	OPT Remarks displayed in Section 9 of the I-20	Optional Practical Training	Yes	Yes; Optional	Text	500 characters
Remarks	Employment/ General Remarks for the Work Authorization	All Types	Yes	Yes; Optional	Text	250 characters
Cancellation Date	Date that work authorization was cancelled	All Types	Yes	No	Date	MM/DD/YYYY
Cancellation Comments	Comments related to work authorization cancellation	All Types	No	No	Text	200 characters

*This field must be manually maintained and is utilized in determining the fields available when generating and sending Edit OPT Employment events. Refer to [“F & M SEVIS Events”](#) for additional information.

STEM extension information

The fields listed in the STEM Extension section within the Basic Employment section of the work authorization record are only displayed for Optional Practical Training work authorizations. The fields in this section are read-only and populated based upon the STEM extension event generated for the work authorization record selected. When generating a STEM Extension event in the SEVIS Wizard, an additional work authorization record is created. Not all fields are displayed in both of the work

authorization records, original and extension. The table below describes all fields that can be populated in this section.

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
STEM Extension Filed Date	Date the STEM extension event was generated and/or saved	Optional Practical Training	No	No	Date	Read-only; Displayed for the original work authorization record and the extension record
Last STEM Reported Date	Date the last 'Report OPT Employment' event was generated and/or saved	Optional Practical Training	No	No	Date	Read-only; Displayed for the original work authorization record and the extension record
Original Start Date (Pre Extension)	Work Authorization Start Date from the original work authorization record that was extended	Optional Practical Training	No	No	Date	Read-only; Displayed for the original work authorization record and the extension record
Original End Date (Pre Extension)	Work Authorization End Date from the original work authorization record that was extended	Optional Practical Training	No	No	Date	Read-only; Displayed for the original work authorization record and the extension record

Cap gap extension information

The fields listed in the Cap Gap Extension section within the Basic Employment section of the work authorization record are only displayed for Optional Practical Training work authorizations. The fields in this section are read-only and populated based upon the Cap Gap extension event generated for the work authorization record selected. The table below describes all fields that are listed in this section.

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Cap Gap Extension Filed Date	Date in which a Cap Gap Extension event was generated and saved in ISSM	Optional Practical Training	No	No	Date	Read-only
Cap Gap Status	Status of the Cap Gap Extension event which was generated and saved in ISSM record	Optional Practical Training	No	No	Date	Read-only

Academic advisor information

The fields listed in the Academic Advisor Information section within the Basic Employment section of the work authorization record are only displayed to track Academic Advisor information related to the work authorization request. The table below describes all fields that are listed in this section.

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Advisor Name	Name of Academic Advisor recommending/approving Work Authorization	All Types	No	No	Text	100 characters
Approval Date	Date Work Authorization was approved	All Types	No	No	Date	mm/dd/yyyy

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Advisor Phone	Phone Number of Academic Advisor recommending/ approving Work Authorization	All Types	No	No	Text	20 characters
Advisor E-mail	E-mail of Academic Advisor recommending or approving Work Authorization	All Types	No	No	Text	100 characters

Employer information

The table below describes all fields that are listed in the Employer Information Detail and Job Information sections. Multiple employers can be attached to a work authorization record, however only one employer at a time can be marked as the primary employer.

Employer details

The following table describes the various fields in the Employer Details section.

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Employer Name	Name of Employer	All Types	Yes	Yes	Text	100 characters
Is Primary	Identifies whether the employment selected is the primary employment	All Types	No	No	Text	Drop-down menu
E-Verify Identification #	Employer Identification number for E-Verify system	All Types	No	No	Text	10 characters
Address Line 1	Address of employer (line 1)	All Types	Yes	Yes	Text	100 characters

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Address Line 2	Address of employer (line 2)	All Types	Yes	Yes; Optional	Text	100 characters
City	City of employer	All Types	Yes	Yes	Text	60 characters
State	State of employer	All Types	Yes	Yes	Text	Drop-down menu
Postal Code	Postal ZIP	All Types	Yes	Yes	Number	5 digits
Postal Routing Code	Postal routing code (+4 ZIP Code)	All Types	Yes	Yes	Number	4 digits
Phone Number	Phone number of employer	All Types	No	No	Text	20 characters
Fax Number	Fax number of employer	All Types	No	No	Text	20 characters

Job information

The following table describes the various fields in the Job Information section.

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Job Title	Job title related to employment	All Types	No	No	Text	100 characters
Job Description	Job description related to employment	All Types	No	No	Text	250 characters
Employment Start Date	Start date of employment	All Types	No	No	Date	mm/dd/yyyy
Employment End Date	Start date of employment	All Types	No	No	Date	mm/dd/yyyy
Salary	Salary related to employment	All Types	No	No	Number; no decimals	10 digits
Hours per Week	Hours per week employed	All Types	No	No	Number; no decimals	10 digits
Supervisor First Name	First name of supervisor at employer	All Types	No	No	Text	100 characters

Field Name	Description	Work Authorization Type Displayed?	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Supervisor Last Name	First name of supervisor at employer	All Types	No	No	Text	100 characters
Supervisor Phone Number	Phone number of supervisor at employer	All Types	No	No	Text	20 characters
Supervisor E-mail	E-mail of supervisor at employer	All Types	No	No	Text	100 characters
Last Employer Report Date	Date of last employer report	All Types	No	No	Date	mm/dd/yyyy
Comment	Comments related to employer report	All Types	No	No	Text	250 characters

12 Contacts Tab

This chapter includes information on the various fields available on the Contacts tab.

- [“Contents of the Contacts tab” on page 12-1](#)
- [“Contents of the Contacts tab” on page 12-1](#)

Contents of the Contacts tab

The **Contacts** tab contains an international scholar or student’s faculty and administrative contacts at the institution, as well as emergency contacts in the U.S. and abroad.

The various fields of the Contacts tab are described in the table below

Field Name	Description	Limits
Name Information		
Contact Type	Choose the type of contact. The contact types need to be defined in the Enterprise Manager before you can select one from this drop-down list. To enter these, you must have permissions to the Enterprise Manager and navigate to Enterprise Manager > Maintain Select Box Values > Contact Type.	Drop-down list
Department	If this contact is in an institution, choose the academic department that this contact is in. The academic departments need to be defined in the Enterprise Manager before you can select one from this drop-down list. To enter these, you must have permissions to the Enterprise Manager and navigate to Enterprise Manager > Maintain Select Box Values > Academic Departments.	Drop-down list
First Name	First name of the contact.	100 characters
Last Name	Last name of the contact.	100 characters
Middle Name	Middle name of the contact	100 characters
Address Information		
Is Address in US?	When checked, notes whether this contact’s address is in the United States	Check box

Field Name	Description	Limits
Address Line 1	First line of the street address (for example, 123 Main Street).	200 characters
Address Line 2	Second line of the street address (for example, Leigh Building).	200 characters
Address Line 3	Third line of the street address (for example, Room 324).	200 characters
City	City of the address.	100 characters
Province	Province of the address, if applicable.	30 characters
Postal Code	Zip code or postal code for this address.	20 characters
Country	Country of the address.	Drop-down list
Phone Information		
Phone 1, type	Phone number for this contact. The type of the phone number (home, mobile, etc.) can be selected. There can be up to three phone numbers per contact.	25 characters
Phone 2, type	Phone number for this contact. The type of the phone number (home, mobile, etc.) can be selected. There can be up to three phone numbers per contact.	25 characters
Phone 3, type	Phone number for this contact. The type of the phone number (home, mobile, etc.) can be selected. There can be up to three phone numbers per contact.	25 characters
Fax Number	Fax number for this contact.	25 characters
E-mail	E-mail address for this contact.	320 characters

13 Custom/Other Tab

This chapter includes information on the various fields available on the Custom/Other tab.

- [“Contents of the Custom/Other tab” on page 13-1](#)
- [“Pre-populated legacy fields” on page 13-1](#)
- [“Pre-populated legacy fields” on page 13-1](#)

Contents of the Custom/Other tab

The **Custom/Other** tab contains fields that do not fit within the context of any of the other tabs in the Record Navigator. Certain legacy data migrated from ISSM 5.0 appears in the **Other Data** section of the tab. Users may enter data in these fields as needed. Generally, the **Other Data** fields are only used at schools that were running previous versions of ISSM and have since upgraded to ISSM 7.0 and above.

Additionally, users with **Maintain Custom Fields** access can use the **Enterprise Manager** to create custom fields to store information that ISSM does not ordinarily track. Although the custom fields can be assigned to any Record Navigator tab, they are assigned to the **Address** tab by default. Refer to Chapter 7, “The Enterprise Manager” of the *ISSM User Guide* for more information on creating and working with custom fields.

All Custom fields are Campus DataLink active.

Note

Custom fields are not SEVIS-reportable; updates to them do not trigger SEVIS events. All text-entry custom fields are limited to 255 characters, and all dates are restricted to mm/dd/yyyy format.

For number custom fields, the maximum allowed entry is 16 numbers before the decimal, followed by 2 numbers. (For example: 1234567899999999.99) Integer custom fields are limited to non-decimal number. ■

Pre-populated legacy fields

ISSM includes the fields listed below when it is first installed. These fields are legacy fields from ISSM 5.0, and exist in ISSM 6.0 and above for record-keeping purposes only.

The legacy fields are not SEVIS-reportable or DataLink-Active.

Field Name	Description
Year of Entry	The individual's year of entry to the school.
Semester of Entry	The individual's first semester at the school.
Version 5.0 Database Status	The individual's Database Status, as used in ISSM 5.0.
Insurance	Insurance information, as entered in ISSM 5.0.
Registration Status	Used in ISSM 5.0 to track enrollment status (Registered, No-Show, New Admission etc.).
Graduation Date (v5.0)	Used in ISSM 5.0 to store the individual's graduation date.

14 Forms Tab

The Forms tab allows you to edit forms, as well as enter a variety of passport, visa, and immigration information for the student or scholar and dependents.

- [“Available forms” on page 14-1](#)
- [“Form generation and data integrity” on page 14-2](#)
- [“Form generation and user permissions” on page 14-2](#)
- [“Document information” on page 14-2](#)
- [“I-94 information” on page 14-3](#)
- [“Prior visa history” on page 14-4](#)
- [“Dependent information” on page 14-6](#)
- [“Immigration history” on page 14-7](#)
- [“Other history” on page 14-7](#)

Available forms

The **Forms** tab creates the following forms:

Form #	Form Name
I-9	Employment Eligibility Verification
I-129	Petition for a Nonimmigrant Worker
I-140	Immigrant Petition for Alien Worker
I-539	Application to Extend/Change Nonimmigrant Status
I-765	Application for Employment Authorization
I-907	Request for Premium Processing Service

Note

Since the I-20 and DS-2019 forms are generated by SEVIS, the interfaces for those forms are located in the Record Navigator’s SEVIS Wizard, not the “Forms” tab. ■

ISSM can generate both new and replacement forms, since the application maintains a listing of old forms in each record that can be recalled as necessary. These forms can also

be generated with user-created form templates that pre-fill forms with frequently-used information. For step-by-step instructions on creating form templates and generating forms, refer to Chapter 3, “The Record Navigator” and Chapter 7, “The Enterprise Manager” of the *ISSM User Guide*.

 **Note**

All of the SEVIS-reportable fields in the **Forms** tab are optional; there is no regulatory requirement to upload this information to SEVIS. If you do not wish to upload this information, be sure that PFS Mode is active. See the *ISSM Technical Guide* and the *User Guide* for more information about PFS Mode. ■

Form generation and data integrity

Data entered in ISSM forms, would need some modification in some instances as the information can be different from SEVIS relevant information, and the changes do not automatically propagate back to the student or scholar records.

Form generation and user permissions

The forms generated in ISSM can be printed and given to students and scholars. They are legal USCIS documents, and should be processed as such.

 **Warning**

Do not grant **Create Forms** access permissions to users that cannot legally generate these documents. Since ISSM Permissions are cumulative, users with **Upload and Download SEVIS Batches** or **Sign/Approve SEVIS Events** permissions are also able to generate forms. ■

Document information

The information in the **Document Information** section stores general immigration documentation information about the selected individual.

Fields with their names written in boldface text are used in SEVIS events.

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
Passport Number	The individual's passport number.	No	Optional	Text	25 characters
Passport Exp. Date	The expiration date of the individual's passport.	No	Optional	Date	mm/dd/yyyy
Passport Country	The country issuing the passport.	No	Optional	Text	Drop-down menu
Visa Number	The number of the visa stamp on the passport.	No	Optional	Text	25 characters
Visa Date	The date on which the visa was issued.	No	Optional	Date	mm/dd/yyyy
Visa Exp. Date	The visa's expiration date.	No	Optional	Date	mm/dd/yyyy
Visa Post Code	Consular post where visa was issued. The values in this list can be set with the Enterprise Manager.	No	Optional	Text	Drop-down menu

I-94 information

The information contained in the **I-94 Information** section of the Forms tab should come from the individual's I-94 document.

Fields with their names listed in boldface are used with SEVIS events

Field Name	Description	Triggers SEVIS Events?	SEVIS	Data Type	Limits
I-94 (Immigration) Status	The individual's I-94 immigration status. ImmigStatus in the Campus DataLink.	No	Non-SEVIS	Text	Drop-down menu
I-94 (Immigration) Status Expiration Date	The expiration date of the I-94 Immigration Status. ImmigStatusExp in the Campus DataLink.	No	Non-SEVIS	Date	mm/dd/yyyy

Field Name	Description	Triggers		Data Type	Limits
		SEVIS Events?	SEVIS		
D/S Checkbox	Indicates D/S (Duration of Status) when checked. ImmigStatusExpDS in the Campus DataLink.	No	Non-SEVIS	Check box	N/A
I-94 (Admission) Number	I-94 Arrival/Departure Number. AdmissionNumber in the Campus DataLink.	No	Non-SEVIS	Text	11 characters
Last Arrival Date	Last date on which the individual entered the US DateOfEntry in the Campus DataLink.	No	Non-SEVIS	Date	mm/dd/yyyy
A Number	Alien Registration Number	No	Non-SEVIS	Text	50 characters
Port of Entry	Port through which the individual entered the US. PortofEntry in the Campus DataLink.	No	Optional	Text	Drop-down menu
Port of Entry Remarks	Remarks related to Port of Entry information. POERemarks in the Campus DataLink.	No	Non-SEVIS	Text	500 characters

Prior visa history

This section collects information about the individual's past immigration experience. Schools using the **International Scholar Dossier Integration System** can remotely collect this information from the scholars themselves.

The fields listed below are not SEVIS-reportable; updates to them will not generate SEVIS events.

Field Name	Description	Data Type	Limits
Is the student/scholar currently in the US?	When checked, indicates that the student or scholar is currently in United States.	Check box	N/A
If in US, what is Immigration Status?	The immigration (I-94) status of the student or scholar	Text	50 characters
If in US, what is Immigration Status?	Expiration date listed on the I-94 card	Date	mm/dd/yyyy
Is the student/scholar requesting a change of status?	When checked, indicates that student or scholar is requesting a change of status.	Check box	N/A
If the student/scholar plans to travel outside the US list dates and destinations	Useful for determining when an application should be filed in relation to the student's/scholar's travel plans.	Text	300 characters
Has the student/scholar ever been to the US on J-1 status?	For advising purposes relating to 2-year subject requirement 212(e) or 12 month bar.	Check box	N/A
Total Prior months on J-1 Status	Same as above.	Number	Integer
Has the student/scholar ever been to the US on H-1 status?	Determine if any time (towards the 6 year limit) has already been used in H-1 status	Check box	N/A
Total Prior months on H-1 Status	Same as above.	Number	Integer
Is the student/scholar subject to the 2-year (212e) residency requirement?	Indicates that the individual is subject to the 212e residency requirement.	Check box	N/A
Has the student/scholar ever been recommended for a waiver?	Indicates that the individual has been recommended for a waiver.	Check box	N/A
Was the waiver granted?	Indicates whether a waiver was granted.	Check box	N/A
Does the student/scholar have a petition of Permanent residence pending?	Indicates that the student or scholar is currently petitioning for permanent residence.	Check box	N/A
Does the student/scholar have a close relative who is a US citizen or Perm. Resident?	Useful for advising purposes; relates to student's or scholar's chances of being denied a US visa.	Check box	N/A
What is their relationship to the scholar?	Relationship to individual of relative indicated in above item.	Text	50 characters

Field Name	Description	Data Type	Limits
Where will the student/scholar apply for a visa?	City or consular post where student or scholar will apply or visa	Text	50 characters
What is the student/scholar anticipated date of arrival?	Individual's anticipated date of arrival in the US.	Date	mm/dd/yyyy

Dependent information

The following table contains information about Dependents. The information is used with non-SEVIS immigration forms.

The fields listed below are not SEVIS-reportable; updates to them will not trigger SEVIS events

Field Name	Description	Data Type	Limits
Is the scholar's family currently in the US?	Self-explanatory.	Check box	N/A
If yes, what is their visa status?	Used to determine how scholar dependents are processed. For example, if a spouse or child of an H-1 is already in H-1 status, it may not be necessary to file for an H-4.	Text	50 characters
Will they need a change of status (to J-2, H-4 etc.)?	Same as above.	Check box	N/A
If married, will the spouse accompany the scholar?	Self-explanatory.	Check box	N/A
If spouse will accompany the scholar later, when?	Self-explanatory.	Date	mm/dd/yyyy
Will children accompany the scholar?	Self-explanatory.	Check box	N/A
If children will accompany the scholar later, when?	Self-explanatory.	Date	mm/dd/yyyy

Immigration history

The **Immigration History** section should be used for general record-keeping pertaining to previous visits to the US by the selected individual. For instance, if the individual transferred from another school, or had worked in the US and returned home prior to enrolling at your school, you may want to store that information here.

The **Immigration History** fields are not SEVIS-reportable. Changes to them will not trigger SEVIS events

Field Name	Description	Data Type	Limits
Visa Classification	The Visa Classification of the selected immigration history.	Text	N/A
Start Date	The date on which the previous immigration history began.	Text	N/A
End Date	The date on which the previous immigration history ended	Text	N/A
Purpose of Stay	The reason the individual came to the US.	Text	N/A
Location of Stay	The location the individual worked/ lived at during the previous stay.	Text	N/A
US Institution	The institution or organization with which the individual was affiliated during his/her stay.	Text	N/A

Other history

The **Other History** section lists any immigration documents relevant to the individual **Immigration History**.

The **Other History** fields are not SEVIS-reportable. Changes to them will not trigger SEVIS events

Field Name	Description	Data Type	Limits
Form Type	Selects the type of form issued to the student (I-20, DS-2019, I-29, etc.).	Text	Drop-Down Menu
Start Date	The beginning date of the form's validity.	Date	mm/dd/yyyy
End Date	The end date of the form's validity.	Date	mm/dd/yyyy
Date Issued	The date on which the form was issued.	Date	mm/dd/yyyy

Field Name	Description	Data Type	Limits
Description	A description of the form's purpose, or any other remarks about it.	Text	N/A
Who Issued	The name of the DSO/PDSO who issued the form to the individual, and/or the name of the signer.	Text	N/A
School Issued	The name of the institution that issued the form to the individual.	Text	N/A

15 Documents Tab



The Documents tab is the main screen to view and manage all documents attached to an individual's record. Documents may be attached to an individual's record through several other tabs (reviewed later in this chapter), enabling the automatic association of the document with that particular tab using a Context Type. Furthermore, documents may be attached to individual sub-records such as individual dependents, contacts, profiles, and work authorizations.



Note

While each of these individual tabs and sub records contain the display and management of its own documents (its own context type), the **Documents** tab contains display and management of all documents in all context types for an individual's record. ■

- [“Typical usage of the Document Attachment feature”](#)
- [“Contents of the Documents tab”](#)
- [“Document attachment implementation in other tabs”](#)

Typical usage of the Document Attachment feature



Typical uses may include the attachment of documents to an individual's record in addition to, or as an alternative to, maintaining hard-copies. These documents are then available to advisors across campus, as normal records are, based on their user permissions to read/write and view ISSM records, per department. Examples of documents for attachment to ISSM records include financial certificates, copies of passports/visas, SEVIS forms generated in RTI, and others, to meet ISSO-specific case management needs. Documents attached to ISSM records naturally associate themselves to specific profiles, work auths, dependent, etc., while maintaining the document association with the individual's history per SEVIS/non-SEVIS/program profile and other categories.

Acceptable file extensions for document attachments are listed below:

Extension	Description
.txt (TXT)	Plain text document
.rtf (RTF)	Rich text document
.xls (XLS)	Microsoft Excel worksheet (1997 - 2003)
.xlsx (XLSX)	Microsoft Excel worksheet

Extension	Description
.doc (DOC)	Microsoft Word document (1997 - 2003)
.docx (DOCX)	Microsoft Word document
.ppt (PPT)	Microsoft PowerPoint presentation (2003 and before)
.pptx (PPTX)	Microsoft PowerPoint presentation
.pdf (PDF)	Portable Document Format
.jpeg (JPEG)	Compressed image format
.jpg (JPG)	Compressed image format
.gif (GIF)	Compuserve's Graphic Interchange Format
.bmp (BMP)	Microsoft Windows bitmap image format
.tif (TIF)	Tagged Image File Format
.tiff (TIFF)	Tagged Image File Format
.png (PNG)	Portable Network Graphics format
.htm (HTM)	Hypertext Markup Language
.html	Hypertext Markup Language
.zip	Compressed file format
.rar	Rar archive file format
.msg (MSG)	Microsoft Outlook message file format

Note

Access to view and manage available attached documents, for each user, is based on global *read/write* and *view* permissions, per ISSM department. Consider privacy and security issues with personal documents that will be easily accessible across campus. ■

Contents of the Documents tab

The Documents tab contains the Manage Documents Screen with the following features:

- Add Document pane to select and attach documents to an individual's record.
- List of all available documents for all context types in the individual's record.
- Ability to search/filter, sort, delete, and edit/update available documents.

Add document section

The table below lists all the fields and buttons within the Add Document section.

Field Name	Description	Max Length
Select Document	Click Select to browse for documents to select and attach to ISSM record.	N/A
Document Title (required)	Enter a display name for the document.	100 characters
Keyword (optional)	The document's keyword enables users to search for single or multiple documents using common keywords.	100 characters
Save Document button	Click Save Document to save/attach the selected document, name and keyword.	N/A
Reset button	Reset clears or cancels entries in the Add Document fields without saving.	N/A


List of available documents section

The table below lists all the columns, buttons and filters within the List of Available Documents section.

Manage Documents

Below is a list of available documents for this record.

Select Document :

Document Title : 

Keyword :

The list below represent the list of documents available for the record.

<input type="checkbox"/>	Title	FileName	Keyword	Last Updated	Updated By	Context Type	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	F-1 Visa Image	F-1 Visa Image.jpeg	Visa	7/25/2012	Advisor Last Name,Advisor First Name	General	Delete Edit
<input type="checkbox"/>	Financial Information	Copy of Financial Information.docx	Financial	7/25/2012	Advisor Last Name,Advisor First Name	Profile	Delete Edit

Delete Selected

Column Name	Description
Checkbox	Click Checkbox to select the corresponding document to delete. Check box also gets checked when document is opened. Master check box in header row will select or deselect all with mouse click.
Title	Sortable hyperlink column heading. Search field using Document Title includes button for pop-up menu with search filter.
FileName	Sortable hyperlink column heading. Search field using original filename of attached document. Search field includes button for pop-up menu with search filter.

Column Name	Description
Keyword	Sortable hyperlink column heading. Search field to find single or multiple documents using common keyword associated with document. Search field includes button for pop-up menu with search filter.
Last Updated	Sortable hyperlink column heading. Search field using auto-populated field with date-stamp of last save function. Search field includes button for pop-up menu with search filter.
Last Updated By	Sortable hyperlink column heading. Search field using auto-populated field with name of last user who completed the save function. Search field includes button for pop-up menu with search filter.
Context Type	Sortable hyperlink column heading. Search field accepts only dropdown menu choices. Context Type field is auto-populated with a reference-association based on the tab location used for document attachment. The available context types are, General, Dependents, Profile, Work Authorization, and Contacts
Delete link	Delete hyperlink for individual document is located at end of row listing document to be deleted. Clicking this link will bring up the windows dialog box requiring confirmation in order to proceed with delete function.
Edit link	Hyperlink is located at end of row listing document to be edited. Clicking this link will open edit panel under that corresponding document to update Document Title, Keyword, or option to replace document with new attachment.
Delete Selected link	Hyperlink located below check box column. Will delete all selected (by check box) documents. Clicking this link brings up windows dialog box requiring confirmation in order to proceed with delete function.

Document attachment implementation in other tabs

In addition to the Documents tab, the document attachment feature is also available through the following context specific tabs:

Bio tab

An **Add Documents** hyperlink is located next to the Edit Info. The numeric value (in parenthesis) in the **Add Documents** hyperlink indicates the number of documents available in the Bio page. Clicking the **Add Documents** hyperlink opens the Manage Bio Documents page which is similar in layout and function, to the Manage Documents page in the **Documents** tab (see above grid for list of fields and their functions). Any document uploaded through the **Bio** tab will automatically be assigned the context type of General, which is the only context type displayed in this page. As other context types are absent in the Bio tab, the search and filter functions for Context Type have been deactivated for this

page. Click **Cancel** (located on top-left and bottom-left of page) to exit this page and return to the front page of **Bio** tab.

Dependents tab

The dependent summary grid in the **Dependents** tab includes a separate column titled, Documents. An **Add Documents** hyperlink is located in this column for each listed dependent. The numeric value (in parenthesis) in the **Add Documents** hyperlink indicates the number of documents available for that particular dependent. Clicking the **Add Documents** hyperlink (for a selected dependent) opens the Manage Dependent Documents page, for this dependent, which is similar in layout and function, to the Manage Documents page in the **Documents** tab (see above grid for list of fields and their functions). The page includes a header that contains the last name and first name of the selected dependent. Below the Add Document pane, will be displayed, any available attached documents for this particular dependent, only. Any other dependents for the same parent record will maintain its own list of attached documents. Any document uploaded through the **Dependents** tab will automatically be assigned the context type of Dependents, which is the only context type displayed in this page. As other context types are absent in the **Dependents** tab, the search and filter functions for Context Type have been deactivated for this page. Click **Cancel** (located on top-left and bottom-left of page) to exit this page and return to the front page of **Dependents** tab.

Contacts tab

The contact summary grid in the **Contacts** tab includes a separate column titled, Documents. An **Add Documents** hyperlink is located in this column for each listed contact. The numeric value (in parenthesis) in the **Add Documents** hyperlink indicates the number of documents available for that particular contact. Clicking the **Add Documents** hyperlink (for a selected contact) opens the Manage Contact Documents page, for this contact, which is similar in layout and function, to the Manage Documents page in the **Documents** tab (see above grid for list of fields and their functions). The page includes a header that contains the last name and first name of the selected contact. Below the Add Document pane, will be displayed, those documents uploaded and available for this particular contact, only. Any other contacts for the same parent record will maintain its own list of attached documents. Any document uploaded through the **Contacts** tab will automatically be assigned the context type of Contacts, which is the only context type displayed in this page. As other context types are absent in the **Contacts** tab, the search and filter functions for Context Type have been deactivated for this page. Click **Cancel** (located on top-left and bottom-left of page) to exit this page and return to the front page of **Contacts** tab.

Profile tab

The profile summary grid in the **Profile** tab includes a separate column titled, Documents. An **Add Documents** hyperlink is located in this column for each listed profile. The numeric value (in parenthesis) in the **Add Documents** hyperlink indicates the number of

documents available for that particular profile. Clicking the **Add Documents** hyperlink (for a selected profile) opens the Manage Profile Documents page, for this profile, which is similar in layout and function, to the Manage Documents page in the **Documents** tab (see above grid for list of fields and their functions). The page includes a header that contains the individual's profile status, profile type, program (primary major), and profile start date of the selected profile. Below the Add Document pane, will be displayed, those documents uploaded and available for this particular profile, only. Any other profile for the same parent record will maintain its own list of attached documents. Any document uploaded through the Profile tab will automatically be assigned the context type of Profile, which is the only context type displayed in this page. As other context types are absent in the **Profile** tab, the search and filter functions for Context Type have been deactivated for this page. Click **Cancel** (located on top-left and bottom-left of page) to exit this page and return to the front page of **Profile** tab.

Work Auths tab

The work auths summary grid in the **Work Auths** tab includes a separate column titled, Documents. An **Add Documents** hyperlink is located in this column for each listed work authorization. The numeric value (in parenthesis) in the **Add Documents** hyperlink indicates the number of documents available for that particular work auth. Clicking the Add Documents hyperlink (for a selected work auths record) opens the Manage Work Auth Documents page, for this work auths record, which is similar in layout and function, to the Manage Documents page in the **Documents** tab (see grid for list of fields and their functions). The page includes a header that contains the individual's work auths type, work auths start date, and work auths end date of the selected work auth record. Below the Add Document pane, will be displayed, those documents uploaded and available for this particular work auths record, only. Any other work authorization sub-record for the same parent record will maintain its own list of attached documents. Any document uploaded through the **Work Auths** tab will automatically be assigned the context type of Work Auths, which is the only context type displayed in this page. As other context types are absent in the **Work Auths** tab, the search and filter functions for Context Type have been deactivated for this page. Click **Cancel** (located on top-left and bottom-left of page) to exit this page and return to the front page of **Work Auths** tab.

16 SEVIS Batching

This chapter includes information about the working principle of SEVIS Batching.

- [“Introduction” on page 16-1](#)
- [“SEVIS events and SEVIS-reportable data” on page 16-2](#)
- [“SEVIS events and SEVIS-reportable data” on page 16-2](#)
- [“SEVIS event generation” on page 16-2](#)
- [“Event suppression, completion and approval” on page 16-2](#)
- [“Batch upload” on page 16-3](#)
- [“Batch download and form distribution” on page 16-3](#)
- [“Archiving events” on page 16-4](#)

Introduction

SEVIS provides two methods for schools to submit data on international students and exchange visitors in F, M & J status to the USCIS: the SEVIS Real-Time Interface (RTI) and the SEVIS Batch Interface.

The RTI is a USCIS web site used to manually enter data into SEVIS directly. All changes are immediately populated into the SEVIS system. Consequently, I-20 and DS-2019 documents can be generated immediately. Certain transactions can only be performed in the RTI, and are listed in [“F & M SEVIS Events”](#) and [“J-1 SEVIS Events”](#). Although it is quick, the RTI can only update one record at a time and there is no way of updating records remotely through data transfer.

The SEVIS Batch Interface uses software (such as ISSM) to send data to SEVIS in the form of batches containing updates to multiple records. It is slower than the RTI, but it allows updates to be made to many records at once. The Batch process is a three step process:

1. Data is uploaded to SEVIS in the form of an XML File.
2. SEVIS reads the XML file updating all relevant student or scholar records in its own database.
3. After processing is complete, SEVIS generates a receipt for the transaction and, if necessary, new I-20 or DS-2019 forms for the student(s) or scholar(s). Generally, the new forms are available for download at the start of the next business day.

The subsections below provide an overview of the SEVIS batching process. For step-by-step instructions, refer to the *ISSM User Guide*.

SEVIS events and SEVIS-reportable data

The specific data updates in SEVIS Batches are called “events”. SEVIS has established events based on the typical immigration processes of an F, M or J individual. For instance, the **Create Student** event sends SEVIS data about an incoming F-1 student. Similarly, the **Update Program Information** event reports information about changes to the student’s course of study, such as a change in his/her Major.

Each event contains a pre-set list of required and optional fields. [“F & M SEVIS Events”](#) and [“J-1 SEVIS Events”](#) contain a listing of the required field(s) for each F-1 and J-1 SEVIS batch event.

Note

The SEVIS Interface Control Document (ICD) also contains information about SEVIS-required and SEVIS-optional fields. It can be downloaded from the USCIS Web site. ■

SEVIS event generation

On a broad level SEVIS Events are triggered in ISSM for records that meet the all of the following conditions:

- **Database Status** is set to *Active*
- **Profile Type** is set to *F-1, M-1 or J-1*
- **Profile Status** is either *SEVIS - Active* or *SEVIS - Pending*

Once a record meets these conditions, SEVIS events are generated as SEVIS-reportable fields are updated. For instance, changing a SEVIS - Active F-1 student’s major generates a Update Program Information event. SEVIS events are generated in this manner when records are manually updated through the Record Navigator or using the Campus DataLink.

Event suppression, completion and approval

After an event has been generated, it appears in the **Record Navigator**’s SEVIS tab and the **SEVIS Management** console’s **Event Inbox**. At that point, a DSO reviews the

contents of the event. If the DSO determines, based on case history with the individual, that event is not necessary and has been generated in error, he/she suppresses the event so that it is not uploaded to SEVIS.

If the DSO determines that the information should be uploaded to SEVIS, he/she will make sure that all SEVIS-required fields have been filled in. This process is called **Event Completion**; ISSM notes whether an event is complete or incomplete by marking it with a green or red marker, respectively. Once the event is complete, the DSO can add it to a batch, a process called **Event Approval**. This stage of the process also determines the signer on the SEVIS-issued I-20/DS-2019 form, since the individual who approves the event is also listed as the signer on the form.

Batch upload

After the event has been approved, the PDSO reviews the approved events in the SEVIS Management console's **Upload Manager**. If the PDSO determines that a given event should not be uploaded to SEVIS, then the PSDO can remove it from the batch, at which point, the event would reappear in the Record Navigator's **SEVIS** tab and the SEVIS Management console's Event Inbox as a completed event. If the PDSO determines that the event(s) in the batch should be uploaded to SEVIS, he/she will then upload it. As explained above, SEVIS will process the uploaded event and make a transaction receipt and any relevant forms available for download at the start of the next business day.

Note

The SEVIS batching process outlined in the previous sections works in the same manner for J-1 records as it does for F-1/M-1 records, except it is completed by AROs and ROs instead of DSOs and PDSOs. ■

Batch download and form distribution

At the start of the first business day following the upload, the PDSO or RO will log into ISSM, go to the SEVIS Management console's **Download Manager** and download the previous night's batch. The batch contains two items:

1. Transaction logs for each event, noting whether the update was successful in SEVIS.
2. I-20 or DS-2019 forms, if any were necessary. Not all SEVIS events require the issuance of a new form.

The events also appear in the Processed Events section of the SEVIS Management console's Event Inbox. The PDSO or RO can view the events from either location. If the events are being viewed in the Download Manager, the forms can be printed on a one-at-a-

time basis. If the events are viewed from the Event Inbox, the forms can be printed individually, or as groups containing all or some of the forms.

 **Note**

Troubleshooting PDF forms: If you select a form for printing, but the form does not appear on the screen, confirm that the popup blocker is allowing pop-ups for this site. Confirm that the popup blocker is allowing pop-ups for this site. ■

Once printed, the forms should be given to the students/scholars, since new SEVIS I-20/DS-2019 forms replace the previous ones, meaning that SEVIS-reportable individuals must always have a copy of their latest SEVIS-issued documents.

Archiving events

After the form has been issued to a student or scholar, the event should then be archived so that it does not clutter the **Event Inbox** with old events. Once archived, the events and forms will be accessible through the Record Navigator's **SEVIS** tab.

17 F & M SEVIS Events

This chapter includes information about the F and M events.

- [“Manually generating events” on page 17-1](#)
- [“F/M SEVIS events” on page 17-1](#)
- [“The create student event” on page 17-3](#)
- [“The change educational level event” on page 17-10](#)
- [“F/M SEVIS events” on page 17-13](#)

Manually generating events

Unless otherwise indicated, all SEVIS events can be manually generated by following the steps below:

- Find the student using **Quick Search**.
- Click **SEVIS Wizard**.
- Select the desired event.

 **Note**

You can only select events in accordance with the SEVIS regulations. If a given SEVIS event cannot be generated for the record as it currently stands, it will be greyed out of the SEVIS Wizard menu. ■

F/M SEVIS events

The events listed in the next table are SEVIS-reportable for F/M-type individuals. Most events can be processed through batch, but a few events can only be reported through the SEVIS Real-Time Interface (RTI).

- Available through batch events: *Yes* identifies the events that can be sent through batch and can be processed through ISSM. These batch events are explained in detail later in this chapter.
- Available through RTI events: The events that are only available through RTI cannot be processed through ISSM, or any other SEVIS batching application and must be reported to the US Citizenship and Immigration Services through RTI.

Student Event (F-1, F-2, M-1, M-2)	Available Through RTI	Available Through Batch	I-20 Print Request	Adjudicated Event*
Status Events				
Cancel Student	Yes	Yes	No	No
Create Student	Yes	Yes	Yes	No
Reinstatement - Request	Yes	No	N/A	Yes
Reinstatement - Cancel	Yes	No	N/A	Yes
Terminate Student	Yes	Yes	No	No
Verify Student	Yes	Yes	No	No
Program Events				
Change Educational Level (F-1 only)	Yes	Yes	Yes	No
Change Educational Level - Cancel (F-1 only)	Yes	Yes	No	No
Complete Program	Yes	Yes	No	No
Defer Attendance	Yes	Yes	Yes	No
Disciplinary Action	Yes	Yes	No	No
Extend Program	Yes	Yes	Yes	Yes (M-1) No (F-1)
Extend Program - Cancel	Yes (M-1) No (F-1)	Yes (M-1) No (F-1)	Yes	No
Registration	Yes	Yes	Yes	No
Shorten Program	Yes	Yes	Yes	No
Transfer	Yes	No	N/A	Yes (M-1) No (F-1)
Transfer – Cancel	Yes	No	N/A	Yes (M-1) No (F-1)
Update Program Information	Yes	Yes	Yes	No
Update Events				
Update Financial Information	Yes	Yes	Yes	No
Update Personal Information	Yes	Yes	Yes	No
Full Course of Study Events				
Authorize Drop Below Full Course	Yes	Yes	Yes	No
Authorize Drop Below Full Course - Cancel	Yes	Yes	Yes	No
Authorize Drop Below Full Course - Edit	Yes	Yes	Yes	No

Reprint I-20 Events

Student Event (F-1, F-2, M-1, M-2)	Available Through RTI	Available Through Batch	I-20 Print Request	Adjudicated Event*
Reprint Dependent	Yes (Print)	Yes	Yes	No
Request Document Reprint	Yes	Yes	Yes	No
Dependent Events				
Add New Dependent	Yes	Yes	Yes	No
Cancel Dependent	Yes	Yes	Yes	No
Reactivate Dependent	Yes	Yes	Yes	No
Terminate Dependent	Yes	Yes	Yes	No
Update Dependent Personal Information	Yes	Yes	Yes	No
Work Authorization Events				
Add New CPT Employment (F-1 Only)	Yes	Yes	Yes	No
Add New Off-Campus Employment (F-1 Only)	Yes	Yes	Yes	Yes
Add New OPT Employment	Yes	Yes	Yes	Yes
Cancel CPT Employment (F-1 Only)	Yes	Yes	Yes	No
Cancel Off-Campus Employment (F-1 Only)	Yes	Yes	Yes	No
Cancel OPT Employment	Yes	Yes	Yes	No
Edit CPT Employment (F-1 Only)	Yes	No	N/A	No
Edit Off-Campus Employment (F-1 Only)	Yes	Yes	Yes	Yes
Edit OPT Employment	Yes	Yes	Yes	No
Extend OPT Employment	Yes	Yes	Yes	Yes
Report OPT Employment	Yes	Yes	Yes	No
Request Cap Gap Extension	Yes	Yes	Yes	No

* Adjudicated events require additional paperwork with SEVIS.

The create student event

The **Create Student** event reports new students to SEVIS, and issues them SEVIS I-20 forms.

The **Create Student** event is one of the most important SEVIS events as it is the first step in creating a record to SEVIS. When a **Create Student** event is successfully uploaded to and downloaded from SEVIS, the record is created in the SEVIS database and is assigned a unique SEVIS ID. When the transaction is downloaded by ISSM, this SEVIS ID is

automatically inserted into the ISSM record and is used to transmit subsequent notifications (update events) to SEVIS.

The **Create Student** event also allows you to request a SEVIS I-20. In fact it is most likely that you will be requesting a SEVIS I-20 when sending this event. In a way, this event is the rough equivalent of issuing an initial I-20 document to an incoming student. In the pre-SEVIS days, I-20s were generated by the school (on a typewriter or using software) and given directly by the school to the student. In the SEVIS environment, the SEVIS database is sent the **Create Student** event and the I-20 document is produced by SEVIS Batch process and downloaded by the school the next day. The DSO at the school then signs and gives or sends the document to the student.

 **Note**

Update events for an individual are successful only AFTER the “Create Student” event has been properly submitted and a SEVIS ID retrieved from the download. Successful upload and download of this event results in the creation of a record in SEVIS. ■

Recommended process for new students

For the purposes of this document “New Students” refers to students admitted after the February 15, 2003 SEVIS deadline. New students can either be manually entered into ISSM or imported from the school’s Student Information System (SIS) using the Campus DataLink.

Creating student records

Use the following instructions to create a student record.

1. Open the **Record Navigator**.
2. Click **Add Individual** (below the Quick Search fields).
3. Fill in the student’s information on the Add New Individual Screen. The following:

Field	Setting	Format
Last Name	The student’s last name.	Up to 40 characters
First Name	The student’s first name.	Up to 40 characters
Middle Name	The student’s middle name.	Up to 40 characters
Date of Birth	The student’s birth date.	mm/dd/yyyy (e.g., 02/12/1984)
Campus ID	Campus ID provided by your institution.	20 characters (numbers or letters)
Admission ID	Admission ID provided by your institution.	20 characters

Field	Setting	Format
SSN	Student's social security number	9-digit number (no dashes)
Department	The office or department that will "own" the record, not the academic department where the individual will be studying	Drop-down box
Database Status	Choose Active, Archived, Deleted, or Terminated	Drop-down box
Profile Type	F-1 or M-1	Drop-down box
Profile SubType	Student	Drop-down box
Profile Status	Select a status for this student. For a Create Student event, this should be either SEVIS-Pending or SEVIS-Active.	Drop-down box
DataLink Active	If student information is downloaded through a link, click this check box. When active, those fields are that are automatically filled in through the Campus DataLink cannot be manually filled in.	Check box


- Click **Continue**. The Choose Template window is displayed.

Choose Template

- If your institution provides customized templates, select a template from the drop-down box. Click **Continue** to navigate to the next window.

Fill F/M Information

Note

All fields with the  symbol are required. The Create Student event cannot be uploaded to SEVIS until all of these fields are filled in. ■

- Fill in the pre-requisite information. Any information entered in the Add New Individual screen is added to the appropriate areas in the I-20 form:

Field	Setting
Visa Type	Select the appropriate type of visa for the student
Profile Status	Select a status for this student. For a Create Student event, this should be either SEVIS-Pending or SEVIS-Active
Profile Sub Type	Select Student, Scholar, or Other
Full-Time Status	Full-Time, Part-Time (Approved), Part-Time (Not-Approved), or Unknown
Campus ID	Campus ID provided by your institution
Department	Select the department that the student will belong to
DataLink Status	Active or not active
Start Date	Enter the desired I-20 reporting date
End Date	Enter the desired I-20 expected study completion date

7. Add Admission Number (this is the Admission Number from the I-94 - not the student's admission ID assigned by the institution.)
8. Go to the **SEVIS Reportable Information** section and check the **Full-Time** check box.

To enter additional data in this new record, go to the appropriate **Record Navigator** tab, click **Edit Info**, enter data in the record, and click **Save**.

9. Click **Save** at the top of the screen. A **Create Student** SEVIS event has now been generated for the individual.

 **Note**

When creating F-1 and M-1 student records, the "Full-Time" box should always be checked so ISSM can generate the proper SEVIS event if the student drops below a full course of study. Failing to check the "Full-Time" check box will generate a "Resume Full Course of Study" SEVIS event if the box is later checked, either manually or via Campus DataLink update. ■

10. If a dependent should be included on the admission I-20, click the **Dependents** tab and click **Add New**. Enter the required fields, which include Last Name, Gender, Date of Birth, Relationship and Country of Birth. Also set the dependent's status to *SEVIS-Pending* or *SEVIS-Active*.

11. Click **Save**.

To enter additional dependents, click **Add New** and repeat the previous step.

12. Click the **SEVIS** tab, then click the **Edit** link to the right of the name of the Create Student event. Enter data in all fields with red field names. Those fields are required by **SEVIS**.

13. Click **Save** at the bottom of the screen.

14. Check the color code on the far left of the **Create Student** event.

- If the circle is **green**, then data has been entered in all required fields.
- If the circle is **red**, then data has not been entered in all required fields or is formatted incorrectly, and the previous steps must be repeated to verify that all required information has been included.

15. Once the event has a green marker, click **Submit Events** just below the Create Student event to submit the event for inclusion in a batch of other SEVIS events. The Primary Designated School Official (PDSO) uploads the batch at a later time.

Creating records with the campus dataLink

Use the following instructions to create records with campus datalink.

1. Create the Campus DataLink XML Extract:
 - Follow the instructions contained in the DataLink documentation (*Refer the Technical Guide*) on proper formatting of the XML extract from the campus system. For each new record, ensure that the **Campus ID** field is included in each record, that the **Profile Type** has to be *F-I* or *M-I*, that the **Profile Status** has been set to *SEVIS-Pending*, and that the **FtPt** field has a value of *1* (to indicate that the student(s) is/are listed as “Full-Time.”)
 - Include any available information about the student(s) in the DataLink XML file.
2. Process the DataLink File:
 - When ISSM processes the DataLink XML file, any new records are detected in ISSM and held in a temporary area in the Campus DataLink manager. Users can approve or deny the addition of these records to the ISSM database.
 - When users import new records containing a Profile Status of SEVIS-Pending or SEVIS-Active, ISSM automatically generates Create Student events for those records.
3. Finding the Create Student Events.

Staff can now find pending **Create Students** by opening the **SEVIS Manager** and selecting the **Create Student** option with the **SEVIS Event Type filter**.
4. Complete the events:
 - Staff now completes these create student events by filling out all the fields whose names are listed in red.
 - Click **Save**. Once the event code (circle icon) turns from **red** to **green**, the **Create Student** event is ready for submission and upload to SEVIS.

Recommended process for continuing students

Continuing students must first be created in SEVIS using the Create Student Event. The process for doing this varies depending upon whether the student’s record exists in ISSM.

If the record does not exist in ISSM

Create a new record as outlined in the section entitled **Creating Student Records** above.

If the record already exists in ISSM

1. Find the individual using the Record Navigator's **Quick Search** function.
2. Go to the **Bio** tab and make sure that the individual is marked as *Active*.
3. Go to the **Profile** and click **Edit Info** to the right of the F-1 profile.
4. Locate the **Basic Profile Data** section and verify that the **Mark This Profile As Current** box has been checked.
5. Set the **Profile Status** field to *SEVIS-Pending*.
6. Enter desired I-20 reporting date in the **Start Date** field.
7. Enter desired I-20 expected study completion date in the **End Date** field.
8. Go to the SEVIS Reportable Information section and check the **Full-Time** check box.
9. Click **Save** at the top of the screen. A "Create Student" SEVIS event has now been generated for the individual.



Note

When creating F-1 and M-1 student records, the "Full-Time" box should always be checked so that ISSM will generate the proper SEVIS event if the student drops below a full course of study. Failing to check the "Full-Time" check box will generate a "Resume Full Course of Study" SEVIS event if the box is later checked, either manually or via Campus DataLink update. ■

10. Go to the **Dependents** tab and click **Add New** if a dependent should be included on the admission I-20.
11. Enter any relevant data about the dependent. The fields required by SEVIS are **Last Name, Gender, Date of Birth, Relationship** and **Country of Birth**.
 - Set the Status field to *SEVIS – Pending*.
 - Click **Save**. To enter additional dependents, click **Add New** and repeat the steps listed above.
12. Go to the **SEVIS** tab and click the **Edit** link to the right of the name of the **Create student** event.
13. Enter data in all fields with red field names. These fields are required by **SEVIS**.
14. Click **Save** at the bottom of the screen.
15. Check the color code on the far left of the Create Student event.

- If the circle is **green**, then data has been entered in all required fields.
 - If the circle is **red**, then data has not been entered in all required fields or is formatted incorrectly, and the previous steps must be repeated to verify that all required information has been included.
16. Once the event has a green marker, click **Submit Events** just below the Create Student event to submit the event for inclusion in a batch of other SEVIS events. The Primary Designated School Official (PDSO) uploads the batch at a later time.

Triggering create student events using the campus dataLink

1. Create the Campus DataLink XML Extract.
2. Include any available information about the student(s) in the DataLink XML file.

Follow instructions in the Campus DataLink documentation (*Refer the Technical Guide*) on proper formatting of the XML extract from the campus system. For each new record, ensure that the **Campus ID** field is included in each record, that the **Profile Type** is set to *F-1* or *M-1*, that the **Profile Status** has been set to *SEVIS-Pending*, and that the **FtPt** field has a value of *1* (to indicate that the student(s) is/are listed as “Full-Time.”)

3. Process the DataLink File.

When ISSM processes the DataLink XML file, any new records are detected in ISSM and held in a temporary area in the Campus DataLink manager. Users can approve or deny the addition of these records to the ISSM database. When users import new records containing a **Profile Status** of *SEVIS-Pending* or *SEVIS-Active*, ISSM automatically generates **Create Student** events for those records.

Note

Create Events are created only when Profile Status changes from a non-SEVIS Profile Status to a SEVIS Profile Status (e.g., from *Active/Enrolled* to *SEVIS-Active*). ■

4. Find the Create Student events: Staff can find pending **Create Students** by opening the **SEVIS Manager**, and selecting the **Create Student** option with the **SEVIS Event Type filter**.
5. Complete the events:
 - Fill out all the fields whose names are listed in red.
 - Click **Save**. Once the event code (circle icon) turns from **red** to **green**, the **Create Student** event is ready for submission and upload to SEVIS.

The change educational level event

The Change Educational Level event was new for ISSM 7.0 and above, and SEVIS 5.0 batch. This event notifies SEVIS that an ACTIVE status F-1 student, who is already registered, will have an upcoming change in education level (e.g., a student is in a Bachelor's program and wishes to participate in a Master's program at the same school).

Note

For this feature to work as designed, the following features under the *SEVIS Configuration* options (Enterprise Manager>Configure Application Settings) should be selected as follows:

SEVIS Batch Schema Version = 5
Enable SEVIS Active/Initial Events = checked (default setting is unchecked)

The rest of the information about this event involve the following:

1. Understanding the SEVIS-Initial Status.
2. Performing a Change Educational Level for a student:
 - 2.1. Generate the event through the SEVIS Wizard.
 - 2.2. Register the student at the new level within the student's profile (Record Navigator).
3. Understanding how this event affects other SEVIS events.

About the SEVIS-initial status

After a successful Change Educational Level event, ISSM uploads two records for a student, if appropriate. SEVIS considers the current profile as the active profile, and the new profile as the initial profile. Once a Change Educational Level event is triggered, take a look at the profiles in the Profile tab, the initial profile will have a SEVIS-Initial status. The only time you will see this status is when a Change Educational Level event has occurred.

Note

Once you change the status from SEVIS-Initial to another status, you will not be able to change the status back to SEVIS-Initial. So, be sure that the status should really change.

Generating a change educational level event

The Change Educational Level event must be generated through the SEVIS Wizard.

To generate this event

Note

Before you generate this event, be sure that the student was already registered at the previous educational level. ■

1. From the student's record, click the **SEVIS Wizard**.
2. Click **Change Educational Level**.

Note

If this event is not listed, then ISSM has not been configured to allow Active/Initial events. ■

A profile list appears and displays all profiles with an Active/Enrolled status that exist for the student.

- These profiles may exist if they were created in anticipation that these students would be registered at a later date.
 - If no such profiles exist, then you have the option of creating a new profile either through this wizard OR cancelling out of the wizard and manually creating a profile. If you create the profile manually, you should then return to the incomplete event located in the student's SEVIS tab.
3. Select an existing Active/Enrolled profile (if exists), then click **Continue**. (If you do not select an existing profile, click **Continue** to create one.)
 4. The Change Educational Level fields appear. Fill in all required fields and click **Submit**. If the event is complete, the event may be approved. If not complete, then return to the event and fill in the required fields. When the Change of Educational Level event is batched to SEVIS, ISSM changes the profile status of Active/enrolled to SEVIS-Initial.
 5. Download a successful Change of Educational Level event from SEVIS.

Registering a student with a change in education level

Prior to registering a student that has had a change in education level, be sure that the Change Education Level event has occurred to an Active/Enrolled profile.

To register the student that has had a change in education level:

Note

The sequence for registering a student with a new educational level is very important! Be sure that the events for the student are triggered for the correct profile. For example, if the financial information is different for

the new education level, this information should be sent up for the SEVIS-Initial profile, before the student is registered. ■

1. Open the **Record Navigator** and open the student's record.
2. Click the **Profile** tab, locate the student's SEVIS-Initial profile, and click **Edit Info** next to this profile.
3. Enter the Current Session End Date and Next Session Start Date, then click **Save**. A registration event is created that is marked as Registration-Initial.
4. Batch this Registration-Initial event and wait for a successful download.

Upon a successful Registration event for the Initial record, SEVIS automatically sets the current "Active" record to a "Deactivated" status and changes the "Initial" record to become the new "Active" record.

The steps below (5 through 6) modify the student's ISSM profiles to be similar to the profiles that SEVIS has.

5. Click the **Profile** tab, locate the student's SEVIS-Initial profile, and click **Edit Info** next to this profile.
6. Set the Profile Status to *SEVIS-Active* and Current Profile to *Yes*. Click **Save**.

You now also have a choice of what to do with the original SEVIS-ACTIVE profile that is no longer current. We recommend that you change the status of this profile to "Completed." You may also choose to leave this profile as it is, but you would then have two profiles that have a *SEVIS-Active* status. While ISSM allows you to do this, it may cause some confusion. To change the profile status of the original *SEVIS-Active* profile to *Completed*:

- 6.1. Locate the student's *SEVIS-Active* profile, which is no longer current, and click **Edit Info** next to this profile. Make sure that the Current Profile field is set to **No**.
- 6.2. Set the Profile Status to *Completed*. Click **Save**.

When you save this profile, an event should not be triggered since it is not the current profile.

How this event affects other events

Once a Change Educational Level event has occurred, and as long as a profile with *SEVIS-Initial* status exists for the student, future triggered events may be designated with an *-Active* or *-Initial* (e.g. Update Dependent - Active and Update Dependent - Initial).

The following events are triggered for both the Active and Initial profiles when information changes through either the Record Navigator or the SEVIS Wizard:

- Reactivate Dependent
- Reprint Dependent
- Terminate Dependent
- Update Dependent Information
- Update Personal Information

The following event is triggered for both the Active and Initial profiles when information changes through either the Record Navigator or the SEVIS Wizard, but only one event should be approved and uploaded to SEVIS:

- Add New Dependent (see [“Dependents Tab”](#) for additional information)

The following events are triggered for just the Active profile when triggered through the SEVIS Wizard. In order to trigger the event for the Initial profile, you must change the profile information through the Record Navigator:

- Registration
- Update Financial Information

The following events are triggered for just the Active profile when triggered through the SEVIS Wizard. You cannot trigger the event for the Initial profile:

- Terminate Student
- Dependent - Cancel

F/M SEVIS events

The events that ISSM can process for F-1 individuals, M-1 individuals, and their dependents are described in the following table:

Status events

Event Name	Description	How Event is Triggered	Required Fields
Cancel Student (SEVIS 5)	<p>Notifies SEVIS that the student's SEVIS status is being cancelled for one of the following reasons:</p> <ul style="list-style-type: none"> • The student is not attending • Student's visa was issued for a different SEVIS ID • Student was registered under different SEVIS ID • Student arrived under different SEVIS ID • Record was created in error • Offer was withdrawn 	Profile tab: Change the student's current profile status from SEVIS - Pending or SEVIS - Active to Cancel.	<ul style="list-style-type: none"> • SEVIS ID • Reason

Event Name	Description	How Event is Triggered	Required Fields
Create Student	<p>Reports new students to SEVIS and issues them SEVIS I-20 forms.</p> <p>Note: SEVIS must successfully process this event in order for other events to occur. Therefore many other events are greyed out until you have successfully downloaded the event from SEVIS.</p>	<p>Profile tab: Change the student's profile status from a non-SEVIS status to <i>SEVIS - Pending</i> or <i>SEVIS - Active</i>.</p>	<ul style="list-style-type: none"> • Last Name • Birth Date • Gender • Birth Country • Country of Citizenship • Visa Type (Profile Type) • Reason for Issuing Document • Foreign Address Line 1 • Foreign Address Country • Level of Education • Primary Major • Length of Study • Program (Profile) Start Date • Program (Profile) End Date • "English Required" Value • Academic Term Length • Tuition • Living Expense • Personal Funds • Secondary Major • Minor

Event Name	Description	How Event is Triggered	Required Fields
Terminate Student (formerly Student Termination)	Notifies SEVIS that the student has completed the program or has left school.	Profile tab: Change the Profile Status from <i>SEVIS - Active</i> or <i>SEVIS - Pending</i> to any status <i>other than Complete or Student Cancelled/EV Invalid</i> .	<ul style="list-style-type: none"> • SEVIS ID • Termination Reason • Remarks
Verify Student Status (SEVIS 5)	<p>If there have been no successful events submitted to SEVIS for this student within the past six months, this event verifies that this student (F-1 or M-1) is active with SEVIS.</p> <p>If you need to generate this event for multiple students, you may consider generating a report and using the Generate Multiple Event feature. Refer to <i>Chapter 6 The SEVIS Management Console</i> in the <i>User's Guide</i> for more information on this feature.</p>	SEVIS Wizard or Generate Multiple Events option only (Refer to <i>Chapter 6 The SEVIS Management Console</i> in the <i>User's Guide</i>)	<ul style="list-style-type: none"> • SEVIS ID • Last Name (any) • First Name (any) • Profile Type (must be F or M)

Program events

Event Name	Description	Updates that Trigger this Event	Required Fields
Change Educational Level (SEVIS 5)	<p>Notifies SEVIS that an <i>Active</i> status F-1 student will have an upcoming change in education level, e.g., a student is in a Bachelor's program and wishes to participate in a Master's program at the same school.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p> <p>For additional information on generating this event, please refer to “The change educational level event” of this manual.</p>	SEVIS Wizard Only	<ul style="list-style-type: none"> • SEVIS ID • Level of Education • New Primary Major • Program Start Date • Program End Date • New Length of Study • English Proficiency required • Requirements Met • Academic Term • Tuition Amount • Living Expense Amount • Personal Funds Amount • Secondary Major • Minor
Change Educational Level - Cancel (SEVIS 5)	Notifies SEVIS that the change educational level event that has already been approved is now cancelled.	SEVIS Wizard Only	<ul style="list-style-type: none"> • SEVIS ID
Complete Program (formerly Student Completion)	Notifies SEVIS that the student has completed his/her program. This event should be used when the student is leaving the US and returning home.	Triggered when Profile Status is changed from <i>SEVIS - Active</i> or <i>SEVIS - Pending</i> to <i>Complete</i> .	<ul style="list-style-type: none"> • SEVIS ID • Remarks
Defer Attendance	Notifies SEVIS that a student has deferred his/her attendance to a semester in the future	Profile tab: Push Profile Start Date further into the future.	<ul style="list-style-type: none"> • SEVIS ID • New Program (Profile) Start Date • New Program (Profile) End Date • Remarks

Event Name	Description	Updates that Trigger this Event	Required Fields
Disciplinary Action	<p>Notes disciplinary action taken against the student that the school is required to report to SEVIS.</p> <p>Note: Not all on-campus disciplinary action is necessarily SEVIS-reportable. When in doubt, refer to the SEVIS regulations.</p>	Profile tab: Any disciplinary action information entered in the SEVIS section	<ul style="list-style-type: none"> • SEVIS ID • Criminal Conviction Value • Disciplinary Action Explanation
Extend Program (formerly Extend Student's Program (Program Extension))	Extends the length of the selected individual's program.	Profile tab: Profile End Date is moved further into the future.	<ul style="list-style-type: none"> • SEVIS ID • New Program (Profile) End Date • Explanation
Extend Program - Cancel (M-1 only) (SEVIS 5.0)	<p>Notifies SEVIS to cancel a previously requested extension for an M-1 student.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	SEVIS Wizard only	<ul style="list-style-type: none"> • SEVIS ID • New Program End Date
Registration	<p>Reports that a student is enrolled for the current semester.</p> <p>Fields may be blanked out unless they are required for this event or another event. For information on registering a student that has had a change of level, refer to ““Registering a student with a change in education level””.</p>	Profile tab: Change the Current Session End Date and/or Next Session Start Date.	<ul style="list-style-type: none"> • SEVIS ID • Current Session End Date • Next Session Start Date

Event Name	Description	Updates that Trigger this Event	Required Fields
Shorten Program (SEVIS 5)	Indicates that a student will graduate earlier than indicated on the current I-20.	Profile tab: Change the program end date to a date that is earlier than the current program end date.	<ul style="list-style-type: none"> • SEVIS ID • New Program End Date
Update Program Information (formerly Program Info Update)	<p>This event updates an individual's program information in SEVIS. For F-1 records, this is generally academic information.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Profile tab: Major, Secondary Major, Minor, Length Of Study month(s), English Proficiency Required, English Proficiency Requirements Met, English Proficiency Not Required Reason.	<ul style="list-style-type: none"> • SEVIS ID • New Primary Major • Secondary Major • Minor

Update events



Event Name	Description	Updates that Trigger this Event	Required Fields
Update Financial Information (formerly Financial Info Update)	<p>Updates an individual's financial information in SEVIS.</p> <p>The following fields are no longer required as of SEVIS 5.0:</p> <ul style="list-style-type: none"> • Tuition (but must be at least zero, do not leave blank) • Personal funds (but must be at least zero, do not leave blank) • Living expenses (but must be at least zero, do not leave blank) • Academic term (be sure that the correct academic term is selected) <p>Fields may be blanked out unless they are required for this event or another event.</p>	Profile tab: Tuition, Living Expenses, Dependent Expenses, Other Expenses, Other Expenses Description, Personal Funds, School Funds, School Funds Description, Other Funds, Other Funds Description, Employment Funds, Employment Funds Description, Remarks.	<ul style="list-style-type: none"> • SEVIS ID • Tuition • Living Expenses • Personal Funds

Event Name	Description	Updates that Trigger this Event	Required Fields
Update Personal Information (formerly Personal Info Update)	<p>Updates an individual's personal information in SEVIS.</p> <p>Note: Certain fields in this event are not reported when PFS Mode has been activated. See the <i>ISSM Technical Guide</i> and the <i>User Guide</i> for more information about PFS Mode.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	<p>Bio tab: Date of Birth, Country of Birth, Country of Citizenship, Gender, Social Security Number, First Name, Middle Name, Last Name, Suffix.</p> <p>Address tab: Local (US) or Permanent (Foreign) Address Line 1 or Address Line 2, City, State, Zip Code, Zip Routing Code, Country.</p> <p>E-mail Address tab: E-mail Address</p> <p>Note: An update to the E-mail Address will trigger an event if the PFS setting is set to <i>Send to SEVIS</i>, and if the e-mail being updated matches the e-mail address type selected in the SEVIS E-mail - Address Type setting in Configure Application Settings. See the <i>ISSM Technical Guide</i> and the <i>User Guide</i> for more information about PFS Mode.</p>	<ul style="list-style-type: none"> • SEVIS ID • Last Name

Full course of study events

Event Name	Description	Updates that Trigger this Event	Required Fields
Authorize Drop Below Full Course (formerly Authorized to Drop Below Full Credits)	Notifies SEVIS that the individual's course load has dropped below Full-Time status. SEVIS defines "Full-Time" as 12 credits or higher for the current semester or term. Refer to regulations governing authorization to drop below full course load.	Profile tab: Full-Time Status is set from Full-Time to Part-Time (Approved), Part-Time (Not-Approved) or Unknown.	<ul style="list-style-type: none"> • SEVIS ID • Authorization Reason • Authorization Start Date • Current End Date

Information about the fields:

- SEVIS ID: Student must have a valid SEVIS ID.
- Authorization Reason: Select one of the available reasons.
- Authorization Start Date: Must be after the student's Program Start Date, as well as after the date the event is approved by SEVIS. mm/dd/yyyy format.
- Current End Date: Must be after the authorization start date in mm/dd/yyyy format.
- Remarks: Enter any comments for your records (non-SEVIS).

Event Name	Description	Updates that Trigger this Event	Required Fields
Authorize Drop Below Full Course - Cancel (SEVIS 5.0)	Note: This option is not selectable until a successful Authorize Drop Below Course event has been downloaded from SEVIS.	SEVIS Wizard Only	<ul style="list-style-type: none"> • SEVIS ID • Authorization Reason • Authorization Start Date • Current End Date
Authorize Drop Below Full Course - Edit (SEVIS 5.0)	Note: This option is not selectable until a successful Authorize Drop Below Course event has been downloaded from SEVIS.	SEVIS Wizard Only	<ul style="list-style-type: none"> • SEVIS ID • Authorization Reason • Authorization Start Date • Current End Date

Reprint I-20 events

Event Name	Description	Updates that Trigger this Event	Required Fields
Reprint Dependent (SEVIS 5.0)	<ul style="list-style-type: none"> Reprints an I-20 for a dependent. If a successful Change Educational Level event has occurred for the student, then a dependent reprint occurs for both the SEVIS-Active and SEVIS-Initial profiles. 	SEVIS Wizard Only	<ul style="list-style-type: none"> SEVIS ID
Request Document Reprint (SEVIS 5.0)	<ul style="list-style-type: none"> Reprints an I-20 for the student. Valid reasons for reprinting the I-20 are: <ul style="list-style-type: none"> Travel (valid only for those with F-1, F-2, M-1, or M-2 visa class) Lost Stolen Damaged If a successful Change Educational Level event has occurred for the student, then the student's I-20 reprint occurs for both the SEVIS-Active and SEVIS-Initial profiles. <p>Remarks field may be blanked out.</p>	SEVIS Wizard Only	<ul style="list-style-type: none"> SEVIS ID Reason

Dependent events

Event Name	Description	How Event is Triggered	Required Fields
Add New Dependent	<p>Adds a new dependent to the individual's SEVIS record.</p> <p>Note: Certain fields in this event are not reported when PFS Mode has been activated. See the <i>ISSM Technical Guide</i> and the <i>User Guide</i> for more information about PFS Mode.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	<p>Dependents tab: Change status of a dependent to SEVIS - Active or SEVIS - Pending from a non-SEVIS value.</p> <p>Note: If dependents are added when there is a pending "Create Student" event, the new dependents will be rolled into that event. The "Add New Dependent" event does not appear.</p>	<ul style="list-style-type: none"> • Student's SEVIS ID • Dependent's Last Name • Dependent's Birth Date • Dependent's Gender • Dependent's Birth Country • Dependent's Visa Type (Immigration Status) • Dependent's Relationship to Student
Cancel Dependent (SEVIS 5.0)	<ul style="list-style-type: none"> • Cancels the dependent. • You must select one of the reasons for canceling the dependent: <ul style="list-style-type: none"> • Record created in error • Dependent will not accompany student <p>Note: According to the SEVIS ID, this event is successful only if the dependent is in initial status. There are two scenarios where this can be true:</p> <ul style="list-style-type: none"> • Student is in initial status (has not registered yet). • Student is in active status (has registered) and has a Change Educational Level event. 	<p>Dependents tab: Triggered when a dependent's status is changed to Cancel.</p>	<ul style="list-style-type: none"> • SEVIS ID • Dependent's SEVIS ID • Cancel Reason

Event Name	Description	How Event is Triggered	Required Fields
Reactivate Dependent	Reactivate a previously terminated dependent record in SEVIS.	Dependents tab: Triggered when a dependent's status is changed from a non-SEVIS status to SEVIS - Active or SEVIS - Pending.	<ul style="list-style-type: none"> SEVIS ID Dependent's SEVIS ID Remarks
Terminate Dependent	<ul style="list-style-type: none"> Terminates a dependent's SEVIS record. If a successful Change Educational Level event has occurred for the student, then the dependent in the active profile is terminated. <p>Note: According to the SEVIS ICD, this event is successful only if the dependent is in active status.</p>	Dependents tab: Change dependent's Status from SEVIS - Active or SEVIS - Pending to a non-SEVIS status.	<ul style="list-style-type: none"> SEVIS ID Dependent's SEVIS ID Termination Reason, Remarks
Update Dependent Personal Information (formerly Update Dependent)	<p>Updates a dependent's information in SEVIS.</p> <p>Note: Certain fields in this event are not reported when PFS Mode has been activated. See the <i>ISSM Technical Guide</i> and the <i>User Guide</i> for more information about PFS Mode.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Dependents tab: Dependent's First Name, Middle Name, Last Name, Suffix, Relationship to F-1 student, Date of Birth, Gender, Country of Birth, Country of Citizenship, Visa Type.	<ul style="list-style-type: none"> Student's SEVIS ID Dependent's SEVIS ID Remarks

Work authorization events

Event Name	Description	How Event is Triggered	Required Fields
Add New CPT Employment (formerly CPT Employment)	<p>Issues CPT to a student.</p> <p>When issuing CPT to continuing students not yet in SEVIS, first generate a “Create Student” event. Then, when the record has a SEVIS ID, generate the “Add New CPT Employment” event.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Triggered by SEVIS Wizard or by adding a new work authorization record with authorization type equal to ‘Curricular Practical Training.’	<ul style="list-style-type: none"> • SEVIS ID • Employment Start Date • Employment End Date • Employment “Full-Time” Status • Employer Name • Employer Address • Employer City • Employer State • Employer Zip
Add New Off-Campus Employment (formerly Off-Campus Employment)	<p>Issues Off-Campus Employment to a student.</p> <p>When issuing Off-Campus Employment to continuing students not yet in SEVIS, first generate a “Create Student” event. Then, when the record has a SEVIS ID, generate the “Add New Off-Campus Employment” event.</p>	Triggered by SEVIS Wizard or by adding a new authorization record with authorization type equal to ‘Off-Campus Employment’, Start and End Date.	<ul style="list-style-type: none"> • SEVIS ID • Employment Type • Employment Start Date • Employment End Date

Event Name	Description	How Event is Triggered	Required Fields
Add New OPT Employment (formerly OPT Employment)	<p>Issues OPT to a student. When issuing OPT to continuing students not yet in SEVIS, first generate a “Create Student” event. Then, when the record has a SEVIS ID, generate the “Add New OPT Employment” event.</p> <p>Note: Certain fields in this event are not reported when PFS Mode has been activated. See the <i>ISSM Technical Guide</i> and the <i>User Guide</i> for more information about PFS Mode.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Triggered by SEVIS Wizard or by adding a new authorization record with authorization type equal to ‘Optional Practical Training’, Start and End Date.	<ul style="list-style-type: none"> • SEVIS ID • OPT Start Date • OPT End Date • Employment “Full-Time” Status • Completion Type • Academic Year Met
Cancel CPT Employment	<p>Cancels the CPT employment event that was previously established in SEVIS.</p>	Triggered by SEVIS Wizard or by entering a Cancellation Date on a previously submitted CPT Employment work authorization record from the Work Auths tab.	<ul style="list-style-type: none"> • SEVIS ID • Employment Start Date • Employment End Date • Employment “Full-Time” Status • Employer Name
Cancel Off-Campus Employment	<p>Cancels the Off-Campus employment event that was previously established in SEVIS.</p>	Triggered by SEVIS Wizard or by entering a Cancellation Date on a previously submitted Off-Campus Employment work authorization record from the Work Auths tab.	<ul style="list-style-type: none"> • SEVIS ID • Employment Start Date • Employment End Date • Employment Type

Event Name	Description	How Event is Triggered	Required Fields
Cancel OPT Employment	<p>Cancels the OPT employment event that was previously established in SEVIS.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	<p>Triggered by SEVIS Wizard or by entering a Cancellation Date on a previously submitted OPT Employment work authorization record from the Work Auths tab.</p>	<ul style="list-style-type: none"> • SEVIS ID • OPT Start Date • OPT End Date • Employment “Full-Time” Status
Edit Off-Campus Employment	<p>Edit the off-campus employment event that was previously submitted by batch.</p> <p>Because a student may have multiple off-campus employment events, click the arrow next to the Off-Campus Employment event that you wish to edit.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	<p>Triggered by SEVIS Wizard or by making changes to the Off-Campus Reason Type, Start Date, or End Date on a previously submitted Off-Campus Employment work authorization record from the Work Auths tab.</p>	<ul style="list-style-type: none"> • SEVIS ID • Employment Type • Employment Start Date • Employment End Date

Event Name	Description	How Event is Triggered	Required Fields
Edit OPT Employment (SEVIS 6)	<p>Edits OPT Employment previously submitted by batch.</p> <p>All OPT fields submitted via batch will be editable prior to adjudication (i.e., Requested or Pending status).</p> <p>For Approved status OPT employment, only the following fields will be editable: OPT Start Date, OPT End Date, Employer Name, Employer Address, Course Relevance, Student Remarks, and Remarks up until the OPT end date.</p> <p>If the OPT is in Canceled, Denied, or Withdrawn status, or is in Approved status with an OPT end date in the past, editing is not permitted.</p> <p>For Extended OPT events in any RTI status, only the following fields will be editable: OPT Start Date, OPT End Date, Employer Name, Employer Address, Student Remarks, and Remarks.</p>	<p>Triggered by SEVIS Wizard or by changes to any of the following fields in the Work Auths tab for OPT Employment:</p> <p>Employer Name, OPT Start Date, OPT End Date, Full Time / Part Time, Employer Address 1, Employer City, Employer State, Employer Postal Code, Employer Postal Routing Code, Course Relevance, Academic Year Met, Completion Type, Student Remarks, Remarks.</p>	<ul style="list-style-type: none"> • SEVIS ID • OPT Start Date • OPT End Date • Current Full Time/ Part Time Indicator

Event Name	Description	How Event is Triggered	Required Fields
Extend OPT Employment (SEVIS 6)	Extends the OPT Employment previously submitted by batch to 17-months. The OPT extension start date will be the day after the end date of the current approved OPT segment on which the OPT extension is being requested. The OPT extension end date will be 17 months from the OPT extension start date.	Triggered by SEVIS Wizard only.	<ul style="list-style-type: none"> • SEVIS ID • OPT Start Date • OPT End Date • OPT Full/Part Time • Employer Name • Employer Address Line 1 • Employer City • Employer State • Employer Zip

Event Name	Description	How Event is Triggered	Required Fields
Report OPT Employment (SEVIS 6)	Reports that the student is participating in the OPT extension employment segment. Reporting due dates are 6 months and 12 months after the Employment Start Date.	Triggered by SEVIS Wizard only.	<ul style="list-style-type: none"> • SEVIS ID • OPT Start Date • OPT End Date • Full Time/Part Time
Request Cap Gap Extension (SEVIS 6)	<p>Ability to update a Cap-Gap extension as “Filed”, if the student has provided proof that an employer has filed a petition on the student's behalf to change status to H-1B. When the Cap-Gap extension is marked as Filed, if the student has a current, approved, post-completion OPT, the OPT end date will be updated to a new date (to be provided by Department of Homeland Security each year).</p> <p>Ability to update a Cap-Gap extension as “Waitlisted”, if the student has received confirmation that the petition for the Cap-Gap extension has been waitlisted, the school may mark the Cap-Gap extension as Waitlisted. When the Cap-Gap extension is marked as Waitlisted, if the student has a current, approved, post-completion OPT, the OPT end date will be updated to a new date (to be provided by DHS each year).</p>	Triggered by SEVIS Wizard only.	<ul style="list-style-type: none"> • SEVIS ID • Status

18 J-1 SEVIS Events

This chapter includes information about the J-1 scholar events.

- [“J-1 exchange visitors batch events” on page 18-1](#)
- [“Events unavailable in batch or ISSM” on page 18-2](#)
- [“Manually creating events” on page 18-3](#)
- [“The create exchange visitor event” on page 18-3](#)
- [“Other SEVIS events” on page 18-8](#)

J-1 exchange visitors batch events

The following table lists the SEVIS events that ISSM can process for J-type individuals:

Name of Event	Available through RTI	Available through Batch	DS-2019 Print Request Available
Status Events			
Create Exchange Visitor (formerly Create EV)	Yes	Yes	Yes
Status - Correct Infraction (formerly Correct Technical Infraction)	Yes	Yes	Yes
Status - End (formerly End Program)	Yes	Yes	No
Status - Invalid	Yes	Yes	No
Status - NoShow	Yes	Yes	No
Status - Terminate (formerly Terminate EV)	Yes	Yes	No
Validate (formerly Validate Program Participation)	Yes	Yes	Yes
Program Events			
Program - Amend (formerly Amend Program)	Yes	Yes	Yes
Program - Edit Subject Field Code (formerly Update Subject Field/Code)	Yes	Yes	Yes
Program - Extension (formerly Update Extension)	Yes	Yes	Yes
Program - Matriculate (formerly Update Matriculating EV)	Yes	Yes	Yes
Program - Shorten	Yes	Yes	Yes

Name of Event	Available through RTI	Available through Batch	DS-2019 Print Request Available
Update Events			
Update Biographical Information (formerly Update Biographical Information)	Yes	Yes	Yes
Update Financial Information	Yes	Yes	Yes
Reprint DS2019 Events			
Reprint EV DS2019	Yes	Yes	Yes
Reprint Dependent DS2019	Yes	Yes	Yes
Dependent Events			
Dependent - Add (formerly Add New Dependent)	Yes	Yes	Yes
Dependent - Delete	Yes	Yes	No
Dependent - Edit (formerly Update Dependent Information)	Yes	Yes	Yes
Dependent - EndStatus (formerly End Status for a Dependent)	Yes	Yes	No
Dependent - Terminate (formerly Terminate Dependent)	Yes	Yes	No
Site of Activity Events			
Site of Activity - Add (formerly Add Site of Activity)	Yes	Yes	Yes
Site of Activity - Delete (formerly Delete Site of Activity)	Yes	Yes	No
Site of Activity - Edit	Yes	Yes	Yes

Events unavailable in batch or ISSM

The following table lists the J-type SEVIS events that can only be processed through the SEVIS Real-Time Interface (RTI). SEVIS batching applications like ISSM cannot process these events:

Name of Event	Available through RTI	Available through Batch	DS-2019 Print Request Available
Request Reinstatement	Yes	No	N/A
Cancel Reinstatement Request	Yes	No	N/A
Transfer Exchange Visitor	Yes	No	N/A
Cancel Transfer Exchange Visitor	Yes	No	N/A
Cancel Change of Category Request	Yes	No	N/A
Change of Category Request	Yes	No	N/A
Program - Extend EV Beyond Maximum Duration of Participation Request	Yes	No	N/A
Program - Cancel Extension Beyond Maximum Duration of Participation	Yes	No	N/A
Dependent – Invalid	Yes	No	N/A
Dependent – No Show	Yes	No	N/A

Manually creating events

Unless otherwise indicated, all SEVIS events can be manually generated by following these instructions.

1. From the Record Navigator, use Quick Search to find the student.
2. Click SEVIS Wizard.
3. Select and complete the desired event.

Warning

You can only select events in accordance with the SEVIS regulations. If a given SEVIS event cannot be generated for the record as it currently stands, it cannot be selected from the SEVIS Wizard menu. For instance, since a SEVIS ID is required for the Update Financial Information event, that event is not available for records that do not have a SEVIS ID. ■

The create exchange visitor event

This event is to be used to create the exchange visitor in SEVIS. Similar to the F-1/M-1 Create Student event, this event will be used to report newly admitted (incoming) exchange visitors to SEVIS, and issue a SEVIS DS-2019 and to transition continuing exchange visitors (who are not in the SEVIS database) and issue a SEVIS DS-2019.

New exchange visitors

New exchange visitors can be entered into ISSM either manually or through import from the student information system (SIS) using the Campus DataLink feature.

Manually creating records

Use the following instructions to manually create records.

1. Open the Record Navigator.
2. Below the Quick Search fields, click **Add Individual**. The Add New Individual window is displayed.
3. Fill in the following fields with the specified settings

Field	Setting
Last Name	Last name of the individual.
Department	The office or department that will own the record. Do not set this to the academic department where the student will be studying.
Database Status	Active
Profile Type	J-1
Profile SubType	Choose one of the following: <ul style="list-style-type: none">• Student• Scholar

4. Click **Continue**. The record is created and appears in the **Record Navigator**.
5. Select the template. Click **Continue**.
6. Click the **Profile** tab. The student should have a single J-1 profile.
7. Click **Edit Info** to its right and enter the following information:

Field	Setting
Profile Status	SEVIS-Pending
Start Date	Enter the desired DS-2019 reporting date.
End Date	Enter the desired DS-2019 expected study completion date

8. To enter additional data in this new record, go to the appropriate **Record Navigator** tab, click **Edit Info**, enter data in the record, and click **Save**.

9. Click **Save** at the top of the screen. A Create EV SEVIS event has now been generated for the individual.

 **Note**

The profile subtype is not the same as the J Category, which is a separate field in ISSM. J-1 students should be marked with profile subtype “Student,” while J-1 non-students (researchers, short-term scholars, professors, etc.) should be marked as “Scholars.” If you have J-1 visa holders that you do not consider as scholars, such as Camp Counselors or Au Pair, then you may enter *Other* in this field. ■

Adding dependents

1. If the student or scholar has dependents, click the **Dependents** tab.
2. Click **Add New** if a dependent should be included on the admission DS-2019. Enter the appropriate information for this dependent.
3. Enter any relevant data about the dependent. The fields required by SEVIS are **Last Name, Gender, Date of Birth, Relationship** and **Country of Birth**.
4. Click **Status** and set it to SEVIS - Pending.
5. Click **Save**. To enter additional dependents, repeat these steps.

Updating the SEVIS information

1. Go to the **SEVIS** tab and enter the following information.
2. Click the **Edit link** to the right of the name of the Create EV event.
3. Enter data in all fields with blue field names. Those fields are required by **SEVIS**.
4. Click **Save** at the bottom of the screen.

Submitting the event

1. Check the color code (circle) on the far left of the Create-EV event line. If the circle is **green**, then data has been entered in all required fields. If the circle is **red**, then data has not been entered in all required fields, and the previous steps must be repeated to verify that all required information has been included.
2. Click **Submit Events** just below the **Create EV** event to submit the event for inclusion in a batch of other SEVIS events. The Responsible Officer (RO) will upload the batch to the USCIS at a later time.

Creating records with the campus dataLink

Use the following instructions to create records with campus datalink.

1. Create the Campus DataLink XML Extract:
 - Follow the instructions contained in the DataLink documentation (*Refer to the Technical Guide*) on proper formatting of the XML extract from the campus system. For each new record, ensure that the **Campus ID** field is included in each record, that the **Profile Type** has to *F-1* or *M-1*, that the **Profile Status** has been set to *J-1*.
 - Be sure to include data on any other available DataLink fields for the exchange visitor.
2. Process the DataLink file:
 - When ISSM processes the DataLink XML file, any new records are detected in ISSM and held in a temporary area in the Campus DataLink manager. Users can approve or deny the addition of these records to the ISSM database. When users import new records containing a **Profile Status** of *SEVIS-Pending* or *SEVIS-Active*, ISSM automatically generates Create EV events for those records.
 - When users import new records containing a Profile Status of *SEVIS-Pending* or *SEVIS-Active*, ISSM automatically generates Create Student events for those records.
3. Finding the Create Student Events.

Staff can now find pending **Create EV** events by opening the **SEVIS Manager** and selecting the **Create EV** option with the **SEVIS Event Type filter**.
4. Complete the events:
 - Fill out all the fields that have names listed in red.
 - Click **Save**. Once the event code (circle icon) turns from **red** to **green**, the **Create Student** event is ready for submission and upload to SEVIS.

Continuing exchange visitors

Continuing EVs must first be created in SEVIS using the Create EV event. The process for doing this varies depending upon whether the individual's record exists in ISSM.

If the record does not exist in ISSM

Create a new record as outlined in the section entitled **Manually Creating Records** above.

If the record Already exists in ISSM

1. Locate the record:
2. Find the individual using the Record Navigator's Quick Search function.
3. Go to the **Bio** tab and make sure that the individual is marked as *Active*.
4. Go to the **Profile** tab.
5. Click **Edit Info** to the right of the J-1 profile and set the following information.

Field	Setting
MARK THIS PROFILE AS Current	Check
Profile Status	SEVIS-Pending
Start Date	Enter desired DS-2019 reporting date.
End Date	Enter desired DS-2019 expected study completion date

6. Click **Save**. A Create EV SEVIS event has now been generated for the individual.
7. Click **Save** at the top of the screen. A Create Student SEVIS event has now been generated for the individual.

Adding dependents

1. Navigate to the **Dependents** tab.
2. Click **Add New** if a dependent should be included on the admission DS-2019. Enter any relevant data about the dependent. The fields required by SEVIS are **Last Name, Gender, Date of Birth, Relationship** and **Country of Birth**.
3. Set the Status field to *SEVIS – Pending*.
4. Click **Save**. To enter additional dependents, click **Add New** and repeat the steps.
5. Navigate to the **SEVIS** tab.
6. Click the **Edit link** to the right of the name of the Create EV event.
7. Enter data in all fields with blue field names. These are required by **SEVIS**.
8. Click **Save**.
9. Check the color code (circle) on the far left of the Create-EV event line.

- **Green:** All of the required information has been entered.
 - **Red:** Required information must still be entered into one or more fields. Repeat the previous steps to verify that all required information has been included.
10. Click **Submit Events** just below the Create EV event to submit the event for inclusion in a batch of other SEVIS events. The Responsible Officer (RO) uploads the batch to the INS at a later time.

Triggering a create EV event using the campus dataLink

Use the following instructions to trigger a create EV event using campus datalink.

1. Create the Campus DataLink XML Extract.
 - Follow instructions in the Campus DataLink documentation (*Refer to the Technical Guide*) on proper formatting of the XML extract from the campus system. For each new record, ensure that the **Campus ID** field is included in each record, that the **Profile Type** has to *J-1*, that the **Profile Status** has been set to *SEVIS-Pending*.
 - Include any available information about the student(s) in the DataLink XML file.
2. Process the DataLink file.

When ISSM processes the DataLink XML file, any new records are detected in ISSM and held in a temporary area in the Campus DataLink manager. Users can approve or deny the addition of these records to the ISSM database. When users import new J-type records containing a **Profile Status** of *SEVIS-Pending* or *SEVIS-Active*, ISSM automatically generates Create EV events for those records.

Note

Create EV/Student Events are created only when Profile Status changes from a non-SEVIS Profile Status to a SEVIS Profile Status (e.g., from *Active/Enrolled* to *SEVIS-Active*). ■

3. Find the Create EV events by opening the **SEVIS Manager** and selecting the Create EV option with the **SEVIS Event Type filter**.
4. Complete the events by filling out all the fields whose names are listed in blue.
5. Click **Save**. Once the event code (circle icon) turns from **red** to **green**, the Create EV event is ready for submission and upload to SEVIS.

Other SEVIS events

The table below explains the functions of the other J-1 and J-2 SEVIS events.

Status events

Event Name	Description	How Event is Triggered	Required Fields
Create Exchange Visitor	<p>Reports new exchange visitors to SEVIS and issues them SEVIS DS - 2019 Forms.</p> <p>Note: SEVIS must successfully process this event in order for other events to occur. Therefore many other events are greyed out until you have successfully downloaded the event from SEVIS.</p>	<p>Profile tab: Change the exchange visitor's status from a non-SEVIS status to <i>SEVIS - Pending</i> or <i>SEVIS - Active</i>.</p>	<ul style="list-style-type: none"> • Last Name • Birth Date • Gender • Birth City • Birth Country Code • Citizenship Country Code • Permanent Residence Country Code • Visa Type • Program Start Date • Program End Date • Received US Gov Funds? • Position Code • Category Code • Subject Field Code • Subject Field Remarks • Included Sites of Activity • Foreign Degree Level (for Student Intern only) • Foreign Field of Study (for Student Intern only) <p>Note: As of SEVIS 6.15, SEVIS will no longer require the local address to be sent when an exchange visitor record is created. The Address Line 1, City, State, and Postal/Zip Code field are no longer required fields. However, if any of these address fields are filled in, then the remaining address fields too need to be filled.</p>
Status - Correct Infraction	N/A	SEVIS Wizard Only.	<ul style="list-style-type: none"> • SEVIS ID • Infraction Type

Event Name	Description	How Event is Triggered	Required Fields
Status - End	Notifies SEVIS that the exchange visitor has completed his/her program.	Profile tab: Change Profile Status from SEVIS - Active or SEVIS - Pending to Complete.	<ul style="list-style-type: none"> • SEVIS ID • End Program Reason • Program End Effective Date
Status - Invalid (SEVIS 5.0)	Requests that an exchange visitor record be marked as invalid. Note: You should only use this option if the visitor's record is not active.	Profile tab: Change the Profile Status to Student Cancelled/EV Invalid.	<ul style="list-style-type: none"> • SEVIS ID • Remarks
Status - NoShow (SEVIS 5.0)	Indicates that a J-1 record is invalid.	Profile tab: Change the Profile Status to NoShow. Note: Prior to 6.6, selecting this profile status would trigger a Terminate EV event. This status now triggers the NoShow event.	<ul style="list-style-type: none"> • SEVIS ID
Status - Terminate	Terminates the EV program.	Profile tab: Change the Profile Status to Terminated.	<ul style="list-style-type: none"> • SEVIS ID • Termination Reason • Termination Date
Validate	Validates that the EV is participating in his/her program.	Profile tab: Triggered when Profile Status is changed from SEVIS - Pending to SEVIS - Active.	<ul style="list-style-type: none"> • SEVIS ID • US Address 1 • US Address City • US Address State • US Address Zip

Program events

Event Name	Description	How Event is Triggered	Required Fields
Program - Amend	Shortens the EV program or changes its start date.	Profile tab: Triggered when the Profile Start Date field is modified or the Profile End Date is moved to an earlier date.	<ul style="list-style-type: none"> • SEVIS ID • Program Start Date • Program End Date • Remarks
Program - Edit Subject Field Code	Updates the DS-2019 Subject/Field Code for the EV.	Triggered by changes to the Subject/Field Code.	<ul style="list-style-type: none"> • SEVIS ID • Subject or Field of Study • Remarks • Foreign Degree Level (for Student Interns only) • Foreign Field of Study (for Student Interns only)
Program - Extension (Within Maximum Duration of Stay)	Extends the EV's program.	Profile tab: Triggered when the Profile End Date is set to a later date	<ul style="list-style-type: none"> • SEVIS ID • Program End Date • Remarks
Program - Matriculate	This event is to be used to update matriculating EV.	Profile tab: Triggered by changing Level of Education from Associate to Bachelors, Bachelors to Masters, or Masters to Doctorate.	<ul style="list-style-type: none"> • SEVIS ID • Matriculation Type
Program - Shorten	Indicates that an exchange visitor will finish the program earlier than indicated on the current DS-2019. Fields may be blanked out unless they are required for this event or another event.	Profile tab: Change the program end date to a date that is earlier than the current "program end date."	<ul style="list-style-type: none"> • SEVIS ID • New Program End Date • Remarks

Update events



Event Name	Description	How Event is Triggered	Required Fields
Update Biographical Information	Update the EV's biographical information.	Triggered by updates to: Date of Birth, Country of Citizenship, Country of Birth, Gender, First Name, Middle Name, Last Name, Suffix, US Address Line 1 or US Address Line 2, City, State, Zip Code, E-mail Address, Zip Routing Code, Home Country Position Code, Local Community Coordinator Contact Information, Host Family Contact Information, Boarding School Contact Information, Residential Contact Address Type	<ul style="list-style-type: none"> • SEVIS ID • Last Name • US Address 1 • US Address City • US Address State • US Address Zip

Note: An update to the E-mail Address will trigger an event if the PFS setting is set to *Send to SEVIS*, and if the e-mail being updated matches the e-mail address type selected in the SEVIS E-mail - Address Type setting in Configure Application Settings. See the *ISSM Technical Guide* and the *User Guide* for more information about PFS Mode.

Event Name	Description	How Event is Triggered	Required Fields
Update Financial Information	Amends the EV's financial information. Fields may be blanked out unless they are required for this event or another event.	Triggered by updates to the following funding-related fields: Program Sponsor Funds, U.S. Government Organization Funds 1, U.S. Government Organization Funds 2, International Org. Funds 1, International Org. Funds 2, Government Funds, Binational Commission Funds, Other Org. Funds, Personal Funds.	<ul style="list-style-type: none"> SEVIS ID Relevant Financial Information and Remarks

Reprint DS-2019 Events

Event Name	Description	How Event is Triggered	Required Fields
Reprint Dependent DS2019 (SEVIS 5.0)	Reprints a DS-2019 for a dependent.	SEVIS Wizard Only	<ul style="list-style-type: none"> SEVIS ID
Reprint EV DS2019 (SEVIS 5.0)	<ul style="list-style-type: none"> Reprints a DS-2019 for the student. Valid reasons for reprinting the DS-2019 are: <ul style="list-style-type: none"> Lost Stolen Damaged Other 	SEVIS Wizard Only	<ul style="list-style-type: none"> SEVIS ID Reason

Dependent events

Event Name	Description	How Event is Triggered	Required Fields
Dependent - Add (formerly Create Dependent)	<p>Notifies SEVIS that the EV has dependents.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Dependents tab: Triggered when the Status of a J-2 dependent is changed from a non-SEVIS status to SEVIS - Active or SEVIS - Pending.	<ul style="list-style-type: none"> • EV's SEVIS ID • Dependent's Last Name • Dependent's Date of Birth • Dependent's Gender • Dependent's City of Birth • Dependent's Country of Birth • Dependent's Country of Citizenship • Dependent's Country of Permanent Residence • Dependent's Relationship to EV
Dependent - Delete (SEVIS 5.0)	Select the dependent from the Dependent List.	Dependents tab: Click Delete next to the dependent's information.	<ul style="list-style-type: none"> • EV's SEVIS ID • Dependent's SEVIS ID
Dependent - Edit (formerly Edit Dependent Personal Info)	<p>Updates a dependent's (J-2) personal information.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Dependents tab: Triggered by updates to the following fields in the record of a J-2 dependent: First Name, Middle Name, Last Name, Suffix, Relationship to J-1 EV, Date of Birth, Gender, City or Village of Birth, Country of Birth, Country of Citizenship, Country of Permanent Residence	<ul style="list-style-type: none"> • EV's SEVIS ID • Dependent's SEVIS ID • Dependent's Last Name • Dependent's Relationship to EV

Event Name	Description	How Event is Triggered	Required Fields
Dependent - EndStatus (formerly End Status for a Dependent)	Ends the status of the EV's dependent.	Dependents tab: Triggered when a J-2 dependent's Status is changed from SEVIS - Active to End Status.	<ul style="list-style-type: none"> • EV's SEVIS ID • Dependent's SEVIS ID • End Status Reason
Dependent - Terminate (formerly Terminate Dependent)	Terminates an EV's dependent.	Dependents tab: Triggered when a J-2 dependent's Status is changed to Terminated or when the dependent is deleted.	<ul style="list-style-type: none"> • EV's SEVIS ID • Dependent's SEVIS ID • Termination Reason • Dependent Termination Effective Date

Site of activity events

Event Name	Description	How Event is Triggered	Required Fields
Site of Activity - Add (formerly Add Site Of Activity)	Adds a site of activity for the exchange visitor.	Profile tab: Add a new Site of Activity to a J-1 Profile.	<ul style="list-style-type: none"> • SEVIS ID • Site of Activity Name <p>Note: As of SEVIS 6.15, SEVIS will no longer require the local address to be sent when an exchange visitor record is created. The Address Line 1, City, State, and Postal/Zip Code field are no longer required fields. However, if any of these address fields are filled in, then the remaining address fields too need to be filled.</p>

Event Name	Description	How Event is Triggered	Required Fields
Site of Activity - Delete (formerly Delete Site Of Activity)	<p>Deletes a site of activity for the exchange visitor.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Profile tab: Delete an existing site of activity.	<ul style="list-style-type: none"> • SEVIS ID • Site of Activity Name
Site of Activity - Edit (SEVIS 5.0)	<p>Updates a site of activity that was previously submitted for the selected exchange visitor.</p> <p>Fields may be blanked out unless they are required for this event or another event.</p>	Profile tab: Edit an existing site of activity.	<ul style="list-style-type: none"> • SEVIS ID <p>Note: As of SEVIS 6.15, SEVIS will no longer require the local address to be sent when an exchange visitor record is created. The Address Line 1, City, State, and Postal/Zip Code field are no longer required fields. However, if any of these address fields are filled in, then the remaining address fields too need to be filled.</p>

19 Portal Tab

The International Student Portal is a website that students can use to see the list of university requirements that need to be met before they can register for classes, and to sign up for events. The Record Navigator's **Portal** tab in ISSM provides a view of all the student's activity on the Student Portal.

Use the Record Navigator's **Portal** tab to monitor the student's Portal activities. You can view the supporting documents that the student has uploaded through the Student Portal to meet university requirements, and can approve/decline them. You can create a portal account for the student and manage the account if one already exists. You can also see the events that a student has signed up for through the portal.

Note

The **Portal** tab will be visible only for student records with a **Profile Type** of **F-1**. ■

Creating or Managing a Portal Account

The **Portal Account** section under the **Portal** tab is where you can create a Student Portal account for the student and notify them of the active account. If a portal account already exists for the student, you can edit the portal account details.

New Portal Accounts

Click the **Create Portal Account** link under the **Portal** tab. Select the student's **E-mail Address** from the drop-down list, or type it in the box. This is the e-mail address that the student will use to log in to the portal.

Note

Your system administrator or technical support staff must configure the SMTP e-mail service in order for e-mail communications with students to work and for batch account creation to be possible. See the *ISSM Technical Guide* for more information. ■

To activate the account as soon as it is created, select **Active** from the **Portal Account Status** drop-down list. If you want to create the account and activate it later, select **Inactive**. Click **Save** to create the account. If you have activated the portal account, notify the student by clicking **Save and Send**.

The student will receive an e-mail with the URL for the Student Portal. If it is the first time logging into the International Student Portal, the student will need to click the **First time User** link wherein they will assign their own password.

 **Note**

Ensure that the **Campus ID**, **Date of Birth**, and **Country of Citizenship** fields under the **Bio** tab for the student record are filled in. The student will not be able to log in to the portal without these fields being completed. ■

Existing Portal Accounts


If a portal account for the student already exists, you can use the **Manage Portal Account** link under the **Portal** tab to change the portal account details.

You can specify a new E-mail Address for the account and can Activate or Deactivate the account and notify the student. In case the student has forgotten the account password, you can also use the **Reset Password** button to reset the account password.

Managing Requirements

The **Requirements** section under the **Portal** tab is where you can see the university requirements for the student record and can view the documents that the student has uploaded through the Student Portal to meet those requirements.

Click the **Requirements** link under the **Portal** tab to see the *International Student Requirements* page. All the requirements for the student are displayed in a table with the name, type and current status of the requirement.

Click the  icon to see the files attached to a requirement. To download a document or a file attached to a requirement, click on the document name. To approve a requirement or to change the status of the requirement, click the **Edit** link and select the status from the **Document Status** drop down list. Click **Update** to save the changes.

To change the status of the requirement, click the Edit link for the requirement and select the **Requirement Status**. Click **Update** and then **Save** to save the changes. To notify the student that the requirement has been updated, click the **Send Notification to Entity** button.

To approve all the requirements in the table, select the **Complete** check box in the table header.

 **Note**

The list of available requirements and requirement types can be maintained using the **Configure Registration Requirements** option of the *Enterprise Manager*. ■

Managing Events

The **Events** section under the **Portal** tab lists all the events that the student has signed up for through the Student Portal. To certify that the student has attended the event, select the **Has Attended** check box.

 **Note**

The list of events can be maintained using the **Configure Portal Events** option of the *Enterprise Manager*. ■

Managing Custom Field Data

The **Custom Fields** section under the **Portal** tab displays any additional data that was captured through customized fields. The field name and the data for that field will be displayed. You can edit this data for the student record.

 **Note**

Custom field data will be visible only if custom fields have been configured for the Student Portal using the **Configure Portal Events** option of the *Enterprise Manager*. ■

20 Content Tag Guide

This chapter includes information on inserting dynamic content into e-mail alerts and form letters:

- [“Introduction” on page 20-1](#)
- [“Usage of the content tag guide” on page 20-1](#)
- [“Usage of the content tag guide” on page 20-1](#)
- [“Listing of content tag guide fields” on page 20-2](#)

Introduction

This chapter lists the fields used with the Content Tag Guide, a tool in ISSM that allows users to insert dynamic content into e-mail alert messages, and form letters.

The list of fields is fixed; there is no way for end users to insert new tags into the Content Tag Guide. To request additional tags in future releases of ISSM, send a request (RPE) to Customer Support.

Usage of the content tag guide

The Content Tag Guide appears as a link next to the Body Text fields in the configuration page for a given e-mail alert, as well as the template and editor for form letters.

E-Mail alerts

For information about configuring e-mail alerts, refer to *Managing E-mail Alerts*, in the *ISSM User Guide*.

Form letters

For information about configuring form letter templates, refer to *Managing Form Letters*, in the *ISSM User Guide*

For step-by-step instructions on using the form letter editor, refer to *Sending E-mail and Letters to Students/Scholars/Employees* in the *ISSM User Guide*.

Inserting tags in a message

To insert a tag into an E-mail Alert, copy the tag from the **Content Tag Guide** (CTRL-C) and paste it into the body text of the message, alert, or letter (CTRL-V).

To insert a tag into a Form Letter, you simply need to click on the tag name link. Refer to *The Task and Appointment Manager* in the *User Guide*.

Listing of content tag guide fields

The table below lists the fields used with the Content Tag Guide:

Field	Tag	Description	Location in ISSM
Last Name	\$LastName\$	The individual's Last Name.	Record Navigator > Bio Tab > Passport Name > Last Name
First Name	\$FirstName\$	The individual's First Name.	Record Navigator > Bio Tab > Passport Name > First Name
Gender	\$Gender\$	The individual's Gender.	Record Navigator > Bio Tab > Biographical Information > Gender
Admission (I-94) Number	\$AdmissionNumber\$	The Admission Number (I-94) for the individual.	Record Navigator > Forms > Document Information > I-94 (Admission) Number
Date of Birth	\$BirthDate\$	The individual's Date of Birth.	Record Navigator > Bio Tab > Biographical Information > Date of Birth
CampusId	\$CampusID\$	The individual's Campus ID	Record Navigator > Bio Tab > ISSM Settings > Campus Id
SEVIS ID	\$SEVISID\$	The individual's SEVIS ID	Record Navigator > Bio Tab > SEVIS > SEVIS ID
Suffix	\$Suffix\$	The Suffix for the individual's Passport Name	Record Navigator > Bio > Passport Name > Suffix
Today Date	\$TodayDate\$	Today's Date.	N/A
Country of Citizenship	\$CountryofCitizenship\$	The individual's Country of Citizenship	Record Navigator > Bio Tab > Biographical Information > Country of Citizenship

Field	Tag	Description	Location in ISSM
Current Session End Date	\$CurrentSessionEndDate\$	The Current Session End Date for the student	Record Navigator > Profiles > SEVIS Reportable Information > Current Session End Date
Degree Sought	\$Degree\$	The Degree for the student	Record Navigator > Profiles > Academic Information > Degree Sought
Profile Type	\$ProfileType\$	The individual's Profile Type.	Record Navigator > Profile Tab > Current Profile > Basic Profile Data > Profile Type
Profile Sub-Type	\$ProfileSubType\$	The individual's Current Profile SubType.	Record Navigator > Profile Tab > Current Profile > Basic Profile Data > Profile SubType
Profile Start Date	\$ProfileStartDate\$	The individual's Profile Start Date	Record Navigator > Profile Tab > Current Profile > Basic Profile Data > Profile Start Date
Profile End Date	\$ProfileEndDate\$	The individual's Profile End Date	Record Navigator > Profile Tab > Current Profile > Basic Profile Data > Profile End Date
EV Prospective Start Date	\$ProspectiveStartDate\$	The individual's Prospective Start Date	Record Navigator > Profile Tab > Current Profile > Appointment Data > Prospective Start Date
EV Prospective End Date	\$ProspectiveEndDate\$	The individual's Prospective End Date	Record Navigator > Profile Tab > Current Profile > Appointment Data > Prospective End Date
Secondary Major	\$SecondaryMajor\$	The Secondary Major for the student	Record Navigator > Profiles > Academic Information > Sec. Major Field
US Address Line 1	\$LocalAddr1\$	The first line of the Local address.	Record Navigator > Address Tab > Local Address > Address Line 1
US Address Line 2	\$LocalAddr2\$	Address Line 2 in the Local address	Record Navigator > Address Tab > Local Address > Address Line 2
US Address - City	\$LocalCity\$	The city in the Local address.	Record Navigator > Address Tab > Local Address > City

Field	Tag	Description	Location in ISSM
US Address - State	\$LocalState\$	The state in the Local address.	Record Navigator > Address Tab > Local Address > State
US Address - Postal Code	\$LocalPostalCode\$	The ZIP Code (5-digit) in the Local Address.	Record Navigator > Address Tab > Local Address > Zip Code (5 digit)
US Address - Postal Routing Code	\$LocalPostalRoutingCode\$	The ZIP Routing Code (+4) in the Local address.	Record Navigator > Address Tab > Local Address > Zip Code (4 digit)
US Address - Email	\$LocalEMail\$	The e-mail address mapped to the Local address type.	Record Navigator > E-mail Address Tab > E-Mail Address
Permanent Address Line 1	\$PermanentAddr1\$	The first line of the Permanent address.	Record Navigator > Address Tab > Permanent Address > Address Line 1
Permanent Address Line 2	\$PermanentAddr2\$	Address Line 2 in the Permanent address	Record Navigator > Address Tab > Permanent Address > Address Line 2
Permanent Address - City	\$PermanentCity\$	The city in the Permanent address	Record Navigator > Address Tab > Permanent Address > City
Permanent Address - Province	\$PermanentProvince\$	The province in the Permanent address	Record Navigator > Address Tab > Permanent Address > Province
Permanent Address - Postal Code	\$PermanentPostalCode\$	The postal code in the Permanent Address	Record Navigator > Address Tab > Permanent Address > Postal Code
Permanent Address - Country	\$PermanentCountry\$	The country in the Permanent address.	Record Navigator > Address Tab > Permanent Address > Country
Country of Permanent Residence	\$PermanentResidencyCountry\$	The country of permanent residence in the Permanent address	Record Navigator > Address Tab > Permanent Address > Residence
Permanent Address - Email	\$PermanentEMail\$	The e-mail address mapped to the Permanent address type.	Record Navigator > E-mail Address Tab > E-Mail Address

Field	Tag	Description	Location in ISSM
College/School	\$CollegeSchool\$	The college with which the record is associated (e.g., College of Arts & Sciences, Business School, etc.).	<i>Configuration:</i> Enterprise Manager > Maintain Select Box Values > Colleges <i>Value in Record:</i> Record Navigator > Profile Tab > Current Profile > Academic Information > College/School
Academic Department	\$Department\$	The Academic Department with which the student, or scholar, or employee is associated, if applicable.	<i>Configuration:</i> Enterprise Manager > Maintain Select Box Values > Academic Departments <i>Value in Record:</i> Record Navigator > Profile Tab > Current Profile > Academic Information > Department Program
Major	\$Major\$	The individual's Major	Record Navigator > Profile Tab > Current Profile > Academic Information > Major Field
Middle Name	\$MiddleName\$	The individual's Middle Name	Record Navigator > Bio Tab > Passport Name > First Name
Minor	\$Minor\$	The Minor for the student	Record Navigator > Profiles > Academic Information > Minor Field
Next Session Start Date	\$NextSessionStartDate\$	The Next Session Start Date for the student	Record Navigator > Profiles > SEVIS Reportable Information > Next Session Start Date
Open Doors Level of Study	\$ODLevelofStudy\$	The Open Doors Level of Study for the student or scholar	Record Navigator > Profiles > Open Doors Information > Level of Study

Field	Tag	Description	Location in ISSM
Department Name	\$DepartmentName\$	The name of the International Scholar Dossier Academic department that is associated with the scholar's record	<i>Configuration:</i> Enterprise Manager > Configure Academic Departments > Edit Department > Name <i>Value in Record:</i> Record Navigator > Profile tab > Current Profile > Appointment Data > Department Name
Education Level	\$EducationLevel\$	The Education Level for the individual	Record Navigator > Profiles > Academic Information > Level of Education
Administrator	\$DepartmentAdminName\$	The administrator of the International Scholar Dossier Academic department that is associated with the scholar's record	<i>Configuration:</i> Enterprise Manager > Configure Academic Departments > Edit Department > Administrator Name <i>Associated With:</i> Record Navigator > Profile tab > Current Profile > Appointment Data > Department Name
Preferred Last Name	\$PreferredLast\$	The individual's Preferred Last Name	Record Navigator > Bio Tab > Preferred Name > Last Name
Preferred First Name	\$PreferredFirst\$	The individual's Preferred First Name	Record Navigator > Bio Tab > Preferred Name > First Name
Preferred Middle Name	\$PreferredMiddle\$	The individual's Preferred Middle Name	Record Navigator > Bio Tab > Preferred Name > Middle Name
Preferred Name Suffix	\$PreferredSuffix\$	The Suffix for the individual's Preferred Name	Record Navigator > Bio > Preferred Name > Suffix
Mailing Address Line 1	\$MailingAddr1\$	The first line of the Mailing address	Record Navigator > Address Tab > Mailing Address > Address Line 1
Mailing Address Line 2	\$MailingAddr2\$	The second line of the Mailing address	Record Navigator > Address Tab > Mailing Address > Address Line 2

Field	Tag	Description	Location in ISSM
Mailing Address - City	\$MailingCity\$	The city in the Mailing address	Record Navigator > Address Tab > Mailing Address > City
Mailing Address - State	\$MailingState\$	The US State in the Mailing address	Record Navigator > Address Tab > Mailing Address > State
Mailing Address - Postal Code	\$MailingPostalCode\$	The postal code or ZIP Code (5 digit) in the Mailing address	Record Navigator > Address Tab > Mailing Address > Zip Code (5 digit)
Mailing Address - EMail	\$MailingEMail\$	The e-mail address mapped to the Mailing address type.	Record Navigator > E-mail Address Tab > E-Mail Address
Mailing Address - Postal Routing Code	\$MailingPostalRoutingCode\$	The ZIP Routing Code (+4) or Postal Routing Code in the Mailing Address	Record Navigator > Address Tab > Mailing Address > Zip Code (4 digit)
Mailing Address - Province	\$MailingProvince\$	The province in the Mailing address	Record Navigator > Address Tab > Mailing Address > Province
Mailing Address - Country	\$MailingCountry\$	The country in the Mailing Address	Record Navigator > Address Tab > Mailing Address > Country
Department Admin EMail	\$DepartmentEMail\$	The e-mail address of the administrator of the International Scholar Dossier Academic department that is associated with the scholar's record	<i>Configuration:</i> Enterprise Manager > Configure Academic Departments > Edit Department > Administrator E-Mail. <i>Associated With:</i> Record Navigator > Profile tab > Current Profile > Appointment Data > Department Name
Logged in User First Name	\$UserFirstName\$	The first name of the user who created the alert, letter or message	Enterprise Manager > Configure User Permissions and Roles > Edit User > First Name
Logged in User Last Name	\$UserLastName\$	The last name of the user who created the alert, letter or message	Enterprise Manager > Configure User Permissions and Roles > Edit User > Last Name

Field	Tag	Description	Location in ISSM
Subject Date	\$SubjectDate\$	The date around which an e-mail alert was sent (e.g., the Passport Expiration Date in an e-mail alert announcing that the students' passports will expire in 120 days). For use in e-mail alerts only.	N/A
Send Date	\$SendDate\$	The date on which the alert, letter, or message was sent	N/A
Program Months Remaining	\$ProgramMonthsRemaining\$	The number of months until the end date of the individual's Current Profile. This field can only be used when creating alerts, messages or letters that are sent to a group of records that has been filtered by Profile Type or SubType.	N/A. Calculated from Record Navigator > Profile Tab > Current Profile > Basic Profile Data > Profile Start Date and Profile End Date.
Scholar Location of Employment	\$EVLocationOfEmployment\$	The exchange visitor location of employment	Record Navigator > Profile tab > Current Profile > Appointment Data > Location of Employment

21 Using E-mail Alerts, E-mail Blasts, and Form Letters

This chapter includes information on contacting groups of students, scholars and employees.

- [“Introduction” on page 21-1](#)
- [“Inserting dynamic content from student or scholar records” on page 21-2](#)
- [“How e-mail blasts and alerts are sent” on page 21-2](#)
- [“E-mail blasts” on page 21-2](#)
- [“E-mail alerts” on page 21-4](#)
- [“Form letters” on page 21-5](#)
- [“Troubleshooting” on page 21-6](#)

Introduction

ISSM uses three means of communicating with students, scholars and employees with records in the database:

Type	Description
E-mail Alerts	ISSM can send e-mail alerts to groups of students, scholars or employees notifying them of time-sensitive information. The application includes several pre-formatted alert messages (e.g., “X number of days until Passport expiration date”) and allows end users to create their own alerts to suit localized business requirements.
E-mail Blasts	ISSM can send ad hoc e-mail broadcast messages to groups of students, scholars or employees that meet the criteria of a Report Writer report (e.g. F-1 students majoring in Engineering who graduate at the end of the current semester).
Form Letters	ISSM can take the results of a Report Writer report and use that as a mailing list to which ad hoc or template form letters can be sent. The resulting letters are output to Microsoft Word format, and can then be printed and mailed to the students, scholars or employees.

Inserting dynamic content from student or scholar records

E-mail Alerts, and Form Letters can all contain dynamic content pulled from the record of each student, scholar or employee that receives the message. For information about what fields can be inserted in these messages refer to [“Forms Tab”](#) of this book.

How e-mail blasts and alerts are sent

E-mail blasts and alerts are sent using the SendEMail.bat file what resides in the *c:\fsaATLAS\VBScript* folder of the ISSM server. During initial configuration of the software, the IT staff member responsible for the ISSM server configures the windows control panel to schedule this file to run at regular intervals. Then, as e-mail messages are generated with the E-mail Blast, Ad-Hoc E-mail, and E-mail alert features, SendEMail.bat sends the messages--one at a time--to the desired recipients. This process is handled entirely in the background. Once the user has clicked **Send**, or has finished setting up the alert, ISSM handles the rest.

The messages will get sent out as often as the server configuration allows. If, for example, SendEMail.bat runs twice a day, messages will get sent twice a day. The number of messages that get sent is also dependent on server configuration. If SendEMail.bat runs for an hour a day, it will send out more messages than it would if it only ran for 10 minutes. After SendEMail.bat finishes running, any messages left over in the queue will remain there until the next time SendEMail.bat is run.

Consequently, you should consider the number of e-mail messages your International Office sends in a typical business day, and ask your server administrator to configure SendEMail.bat accordingly. If your office doesn't send many messages, running SendEMail.bat once a day is probably sufficient. If your office relies on e-mail as the primary means of communicating with students, scholars, and staff, it may be advisable to have SendEMail.bat run more than once a day, or to have it run for a longer period of time.

When e-mail alerts or blasts are sent out to students or scholars, they are not sent as a single message that is copied to all of the recipients. Each individual will receive the message as if it has been sent only to him/her.

E-mail blasts

This section discusses about the e-mail blasts.

When to use E-mail blasts

The E-mail Blast feature should be used when advising or administrative staff wishes to send a quick ad-hoc e-mail message to a group of students, scholars, or employees in ISSM. For example, an advisor may generate a list of F-1 students from all countries required for Special Registration and then send e-mail to those students reminding them of the registration deadline.

You can access this feature by generating a specific list of records via the Advanced Search/Report Writer and then sending e-mail to that group. You can also use the Quick Search's **Retrieve Report** option to quickly retrieve a list of records.

Advantages and disadvantages

Advantages

The primary advantage of using the e-mail blast feature instead of the e-mail alert system is its flexibility. The alert system sends scheduled e-mails to users based on predefined time-sensitive information. The e-mail blasts can be generated on an as-needed basis, and can be based on any information contained in the Report Writer.

Disadvantages

The primary disadvantage of the e-mail blast feature versus the e-mail alert system is that the messages must be initiated by the user. For instance, an e-mail alert can be set up that will automatically send e-mail to all students whose passport expires in less than 120 days. Once the alert has been configured, no further action on the part of the end user is required. To produce the same message with the e-mail broadcast feature, the end user must generate a report on records with passports expiring within 90 days, generate the blast, write the message, and send it. Then, for each subsequent message, the process would need to be repeated.

Sending e-mail blasts

For step-by-step instructions on using e-mail blasts, including sending an ad-hoc e-mail blast to a single recipient, refer to the *ISSM User Guide*.

E-mail alerts

When to use e-mail alerts

E-mail alerts should be configured and sent out when you need the system to automatically notify students/scholars of time-sensitive information. Generally, e-mail alerts are sent when a form, passport, or visa issued to the individual will expire in a certain number of days. For example, an e-mail alert could be automatically configured to be sent to all F-1 and J-1 individuals 180 days before their graduation date reminding them to take care of any necessary paperwork.

Advantages and disadvantages

Advantages

The primary advantage of using the e-mail alert system over the e-mail blast feature is that the e-mail alerts are automatic, background operation. For example, once you have configured ISSM to send e-mail to every F-1 individual with 90 days before their passport expiration dates, the application will send the message to every relevant individual, whenever the conditions are met.

Disadvantages

The end user does not have low-level control over when the alerts are sent, or who the recipients are. If the student, scholar or employee fits the criteria for receiving the alert message, it will be sent to him or her, regardless of other circumstances surrounding his or her record. As such, it is important to set up e-mail alerts using exacting criteria. For example, if the user does not specify a database status for the alert, it will be sent to students of all database statuses, including students that have transferred out of the school or have graduated.

Configuring e-mail alerts


For step-by-step instructions on configuring e-mail alerts so that they will be automatically sent to the relevant students, scholars and employees, refer to *ISSM User Guide*.

Form letters

When to use form letters

Form Letters should be used when you need to print out a document and give it (or send it by postal mail) to a group of students, scholars, or employees. The list is compiled using the Record Navigator's Advanced Search feature.

Note

If you need to send a form letter to an individual student, scholar, or employee (not a group), open the person's record in the Record Navigator and click  above the record's tabs. Refer to [“Users & User Permissions”](#) about using this feature to send to an individual. Refer to the *User Guide* for information on using the *Form Letters* feature. Refer to [“Content Tag Guide”](#) for information on using the Content Tag Guide. ■

Advantages and disadvantages

Advantages

By using a Form Letter, you can distribute notices to students or scholars in writing. Since the Form Letters are generated using Microsoft Word and you can add watermarks to the Form Letters through the ISSM watermarks feature, you will also have more control over text formatting, content, style, and layout than you would with a simple e-mail alert or e-mail blast.

Disadvantages

ISSM Form Letters cannot be used as attachments for e-mail alerts or blasts. If they are going to be distributed electronically, the user must find a distribution method outside of the ISSM application.

How to configure and use form letters

Form letters can be generated on an ad-hoc basis or can be built from existing templates. For instructions on producing an ad-hoc form letter, refer to “Sending Form Letters” in the *ISSM User Guide*. For instructions on creating, modifying, or deleting Form Letter Templates, refer to “Managing Form Letters” in the *ISSM User Guide*.

Troubleshooting

There are two basic issues that users encounter when using the E-mail Alerts, and E-mail Blasts.

The messages are sent to too many, or too few individuals

If E-mail Alerts are not being sent to the right number of individuals, you should review the alert configuration to make sure that it is not too restrictive, or that it is pulling the right subset of records from the database. If you do not specify a value, ISSM will assume that you are not concerned about a specific value for that field. For example, if an E-mail alert configuration does not specify a Profile Status for recipients, the alert mail messages are sent to individuals with Profile Types of **Student**, **Scholar**, or **Other**.

Additionally, e-mail alerts are always sent to the e-mail address(es) specified within the e-mail alert. If a given individual is not receiving an alert that he/she should be receiving, check his/her record to be sure that the address specified as the current address contains a valid e-mail address.

The messages are not sent at all

Messages not being sent at all can be attributed to one or more of the following configuration problems:

Message	Problem and Solution
Bad or Missing SMTP Server	When ISSM is installed, the person installing the application must specify an SMTP (e-mail server). When ISSM sends e-mail messages, it routes them through this server. If the server is not specified, or if the address of the server has been incorrectly entered, ISSM will not be able to send messages. To check the specified SMTP server, log into the ISSM server and check the SMTP Server value in the Server Configuration Utility (<i>c:\fsaATLAS\ServerUtil.exe</i>).
Bad or Missing "From" E-Mail Address	The e-mail alerts must have a valid value for the From address. If this value is misspelled or missing, or if it contains a dummy e-mail address, ISSM will not be able to send the alert.

Message	Problem and Solution
E-Mail Alert is Not Scheduled	As explained under How E-mail Blasts and Alerts Are Sent earlier in this chapter, the E-mail alerts are sent by the <i>SendEMail.bat</i> operation, which must be scheduled to run periodically on the fistulas server. If this operation has not been scheduled, or has only been scheduled to run a single time (rather than as a recurring, daily event), the E-mail alerts will not be sent. For instructions on configuring the <i>SendEMail.bat</i> operation, refer to “Scheduling E-Mail Batches” in the <i>ISSM User Guide</i> .
Incorrect E-Mail Alert Configuration	If the e-mail alerts have been properly configured and no messages are being sent, review the configuration of the e-mail alert to be sure that it has not been set up in such a way to exclude all records in the ISSM database.

Cannot see form letter or e-mail blast buttons

You need to retrieve your list of students with the Advanced Search, or by using the **Retrieve Report** drop-down menu in the Quick Search, otherwise the **Form Letter** and **E-Mail Blast** buttons will not appear in the Record Navigator.

22 Open Doors Reporting

This chapter includes information about how to produce IIE Open Doors Reports using ISSM.

- [“Introduction” on page 22-1](#)
- [“Listing of open doors reports” on page 22-1](#)
- [“Including records in open doors reports” on page 22-3](#)
- [“Running an open doors report” on page 22-5](#)
- [“Open doors reporting and the campus dataLink” on page 22-5](#)
- [“Troubleshooting” on page 22-5](#)

Introduction

Open Doors reports are produced by colleges with F-1 and J-1 students and scholars. The reports provide a statistical breakdown of their international enrollment population and appear in the annual Open Doors compilation published by the Institute of International Education. For more information about Open Doors reporting or the Institute of International Education, visit <http://opendoors.iienetwork.org>.

Listing of open doors reports

ISSM can produce the Open Doors reports listed below.

 **Note**

To request the addition of new Open Doors reports or other pre-formatted reports to the ISSM Report Writer, contact customer support. ■

Student open doors reports

Report	Description
Student Open Doors Report (A) Total	Counts the total number of students in ISSM. Uses the following Fields: Profile SubType, Include in Open Doors Reports.
Student Open Doors Report (B) Gender	Counts the number of male and female students in ISSM, with sub-totals for Open Doors Level of Study (Graduate, Undergraduate and Other). Uses the following Fields: Profile SubType, Include in Open Doors Reports, Gender, Open Doors Level of Study.
Student Open Doors Report (C) Marital Status	Counts the number of students in ISSM, sorted by Marital Status (Single, Married, Separated, Divorced, Widowed), with sub-totals for Open Doors Level of Study (Graduate, Undergraduate and Other). Uses the following Fields: Profile SubType, Include in Open Doors Reports, Marital Status, Open Doors Level of Study.
Student Open Doors Report (D) Immigration Status	students in ISSM, sorted by Immigration Status (F-1, J-1, etc.), with sub-totals for Open Doors Level of Study (Graduate, Undergraduate and Other). Uses the following Fields: Profile SubType, Include in Open Doors Reports, I-94 (Immigration) Status, Open Doors Level of Study. This report uses Immigration Status (Forms Tab > I-94 Information > I-94 (Immigration Status), not Profile Status.
Student Open Doors Report (E) Source of Funds	Counts the number of students in ISSM, sorted by Open Doors Primary Source of Funds, with sub-totals for Open Doors Level of Study (Graduate, Undergraduate and Other). Uses the following Fields: Profile SubType, Include in Open Doors Reports, Open Doors Primary Source of Funds, Open Doors Level of Study.
Student Open Doors Report (F) Enrollment Status	Students in ISSM, sorted by Open Doors Enrollment Status, with sub-totals for Open Doors Level of Study (Graduate, Undergraduate and Other). Uses the following Fields: Profile SubType, Include in Open Doors Reports, Open Doors Enrollment Status, Open Doors Level of Study.
Student Open Doors Report (G) Academic Level	Students in ISSM, sorted by Open Doors Academic Level. Uses the following Fields: Profile SubType, Include in Open Doors Reports, Open Doors Academic Level.
Student Open Doors Report (H) Field of Study	Students in ISSM, sorted by Open Doors Field of Study, with sub-totals for Open Doors Level of Study (Graduate, Undergraduate and Other). Uses the following Fields: Profile SubType, Include in Open Doors Reports, Open Doors Field of Study, Open Doors Level of Study.
Student Open Doors Report (I) Citizenship	Students in ISSM, sorted by Country of Citizenship, with sub-totals for Open Doors Level of Study (Graduate, Undergraduate and Other). Uses the following Fields: Profile SubType, Include in Open Doors Reports, Country of Citizenship, Open Doors Level of Study.

Scholar (EV) open doors reports

Report	Description
EV Open Doors (2) Total	Counts the total number of scholars in ISSM. Uses the following fields: Profile SubType, Include in Open Doors Reports.
EV Open Doors (3) Primary Functions	Primary Functions. Counts the number of scholars, with subtotals for Open Doors Primary Function values. Uses the following fields: Profile SubType, Include in Open Doors Reports, I-94 (Immigration) Status, Open Doors Primary Function.
EV Open Doors (4) Visa Statuses	Counts the scholars in ISSM, with subtotals sorted by Immigration Status (F-1, J-1, etc.). Uses the following Fields: Profile SubType, Include in Open Doors Reports, I-94 (Immigration) Status, Open Doors Level of Study. This report uses Immigration Status (Forms Tab > I-94 Information > I-94 (Immigration Status), not Profile Status.
EV Open Doors (5) Gender	Counts the scholars in ISSM, with subtotals by gender. Uses the following Fields: Profile SubType, Include in Open Doors Reports, Gender.
EV Open Doors (6) Major Field of Specialization	Counts the scholars in ISSM, with subtotals for Open Doors Major Field of Specification. Uses the following Fields: Profile SubType, Include in Open Doors Reports, Open Doors Major Field of Specification.
EV Open Doors (7) Country of Citizenship	Counts the scholars in ISSM, with subtotals for Country of Citizenship. Uses the following fields: Profile SubType, Include in Open Doors Reports, Country of Citizenship.

Including records in open doors reports

ISSM will only include in Open Doors reports those records that meet both of the following criteria:

- The record has been activated for Open Doors reporting
- The record has data in the relevant field(s)

For example, if you are producing an Open Doors report that includes the Open Doors Field of Study value for all of your students, the Report Writer will not return a list of all F-1, sorted by major. It will return records that match all of the following:

- Records with a Profile Subtype of Student
- Records that are active for Open Doors reporting
- Records that contain a value in the Open Doors Field of Study field

If the record fails to meet any one of the criteria listed above, it is not counted in the report. When readying a record for inclusion in an Open Doors report, it is essential to make sure that it meets all relevant criteria for the report(s) in which it will be included.

Activating a record for open doors reporting

Use the following instructions to activate a record for Open Doors reporting.

1. Open the record in the **Record Navigator**.
2. Go to the **Profile** tab.
3. Open the **Current Profile**.
4. Scroll down to the **Open Doors Information** section.
5. Make sure that the **Include in Open Doors Reports** box has been checked.
6. Scroll back up to the top of the page and click **Save**.

Entering data in the open doors fields

Use the following instructions to enter data in an Open Doors field.

1. Open the record in the **Record Navigator**.
2. Go to the **Profile** tab.
3. Open the **Current Profile**.
4. Scroll down to the **Open Doors Information** section.
5. Make sure that the **Include in Open Doors Reports** box has been checked.
6. Fill in the appropriate value in the relevant field(s).

Note

It is advisable to fill in as many of the Open Doors fields at once as possible. ■

7. Scroll back up to the top of the page and click **Save**.

Note

The **Open Doors Field of Study** and **Open Doors Major Field of Specification** fields are auto-populated when the **Major** and **Subject/Field Code** fields, respectively, are filled in. They are not manually filled like the other Open Doors fields. ■

Running an open doors report

The Open Doors reports are pre-configured reports that can be retrieved from the Report Writer. For step-by-step instructions on producing Open Doors Reports, refer to “Running Existing Reports” in Chapter 5, “The Report Writer” of the *ISSM User Guide*.

Open doors reporting and the campus dataLink

The Open Doors fields are not **Campus DataLink** fields, and must be manually populated. There are limited auto-population business rules associated with certain fields, as explained in the table below.

 **Note**

To request enhancements to the Campus DataLink, contact customer support through the Customer Support Center. ■

Field Name	Report Type	Auto-Populated By Record Navigator Field	Auto-Populated by DataLink Field	Configuration Setting
Open Doors Field of Study	Student	Major	PrimaryMajor	Enterprise Manager > Maintain Select Box Values > Majors
Open Doors Major Field of Specification	Scholar	Subject/Field Code	SubjectFieldCode	Enterprise Manager > Maintain Select Box Values > DS-2019 Subject Field Codes
Open Doors Level of Education	Student	Level of Education	EduLevel	Enterprise Manager > Maintain Select Box Values > Education Levels

Troubleshooting

Most Open Doors issues stem from one or more of the following causes:

Auto-populated fields are not being filled

If an auto-population field, such as Open Doors Major Field of Specification or Open Doors Field of Study, is not being filled, go to the Enterprise Manager and check the

configuration for the field that auto-populates the Open Doors field to be sure that it contains an Open Doors value.

 **Note**

Refer to the previous table for a list of Open Doors auto-population fields and configuration settings. ■

Record is not activated for open doors reporting

If a record has not been activated for Open Doors reporting, it will not be included in the report, even if all relevant fields have been filled in. For instructions on activating a report for Open Doors, refer to [“Activating a record for open doors reporting”](#).

Record is missing data in one or more relevant fields

If a record is missing data in any of the fields used in a given report, then it will not be counted. Review the list of fields under [“Listing of open doors reports”](#) to make sure that all relevant records have data in the fields used by the report.

 **Note**

If you cannot find which records are missing data, or which fields are empty, ISSM technical support can provide your server administrator with database queries that will determine which field(s) and/or record(s) are missing information needed for Open Doors reporting. ■