

Saving Trees, Space and Your Sanity

Transition to a Paperless Immigration Office

- Laura Gerth
 - International Student Advisor
- Roy Bronkema
 - Office Coordinator

University of Notre Dame

- Benefits
- Tools and Technology
- New Student Registration
- Managing Work Flow
- Processing Benefits and Requests
- Making It Work

- Multiple people can access files at the same time
- No more missing files
- Less dependent on a printer
- Decreased paper file storage space
- A central communication hub

Benefits of “going paperless”

- Translation of notes/handwriting
- Managed work flow, no more scraps of information everywhere
- Traceable deadlines
- Bottlenecks are more obvious

Benefits of “going paperless”

- Banner
- fsaATLAS
- Scanners
- Html web forms
- International Ambassadors (IAs)

Tools and Technology



New Student Registration

- Almost 300 new students (August)
- Student checks in with IA
- IA gives documents to scanning station
- Student completes web registration form
- DSO checks documents
- IA scans and labels documents
- Documents are returned to student

New Student Registration



Immigration Registration

Processing Instructions

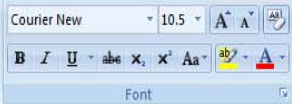
Students are required to register with the Immigration Services Office within one week of their arrival in the United States. You are also required to attend the mandatory New Student Orientation from August 17-19. Please see the [ISSA website](#) for details.

Student Information

- 1. Today's Date
- 2. Last/Family Name
- 2. First/Given Name
- 4. Gender
Male Female
- 5. Date of Birth
- 6. ND Student ID Number

Address and Contact Information U.S. Address

- Street
- Apartment
- City



```
<!-------BEGIN HEADER----->
From:wwwforms@nd.edu<>
Date:Fri May 27 10:33:43 2011
Host-From: (172.21.132.9)
Originator-AFSid:
-----END HEADER----->

From:wwwforms@nd.edu
To: undiso.undiso.1@nd.edu
Reply-To: wwwforms@nd.edu
Sender: wwwforms
Date: Fri May 27 10:33:43 2011
X-Mail-Gateway: WWW-FORM-MAIL Gateway
X-Real-Host-From: (172.21.132.9)
X-WWW-Referer:
http://www.nd.edu/~undiso/Registration/Immigration_Registration.html
X-Originator-AFSid:
Subject:Form Feedback for
http://www.nd.edu/~undiso/Registration/Immigration_Registration.html

Today's Date: : 5/16/2011

Last/Family Name: : Example

First/Given Name: : Justin

Gender : Male

Date of Birth: : 8/2/1988

ND Student ID Number: : 123456789

Street: : 101 Main Street

Apartment: :

City: : Notre Dame

State: : IN

Zip Code: : 46556

Home Country Phone Number: : 123456

Language spoken at home: : Russian

Personal Email : : Justin@email.com

Notre Dame Email : : Justin@nd.edu

Degree Level : Bachelor's

Major/Field of Study : Physics
```

ISO Use Only :

1. Initial Intake :

Name highlighted on admit chart by:.....:

Date :

2. Sam-Hold Release .:

Are the immigration status and visa dates correct in GOAINTL? :

Was the Z3 Hold Release done in Banner? :

Above verified and file moved to Laura by:.....:

Date completed :

3. Laura-Registration :

Registered in fsaAtlas or in Sevis? :

Immigration Problems:.....:

Above verified and file moved to Roy by:.....:

Date:.....:

Date:.....:

4. Roy-Final Step .:

Was the final highlight done on the admit chart? :

Was the date of Registration added to the admit chart? :

Highlight completed by:.....:

Final Step: Save the Registration Form as a PDF on the P-drive. :

Notes:.....:

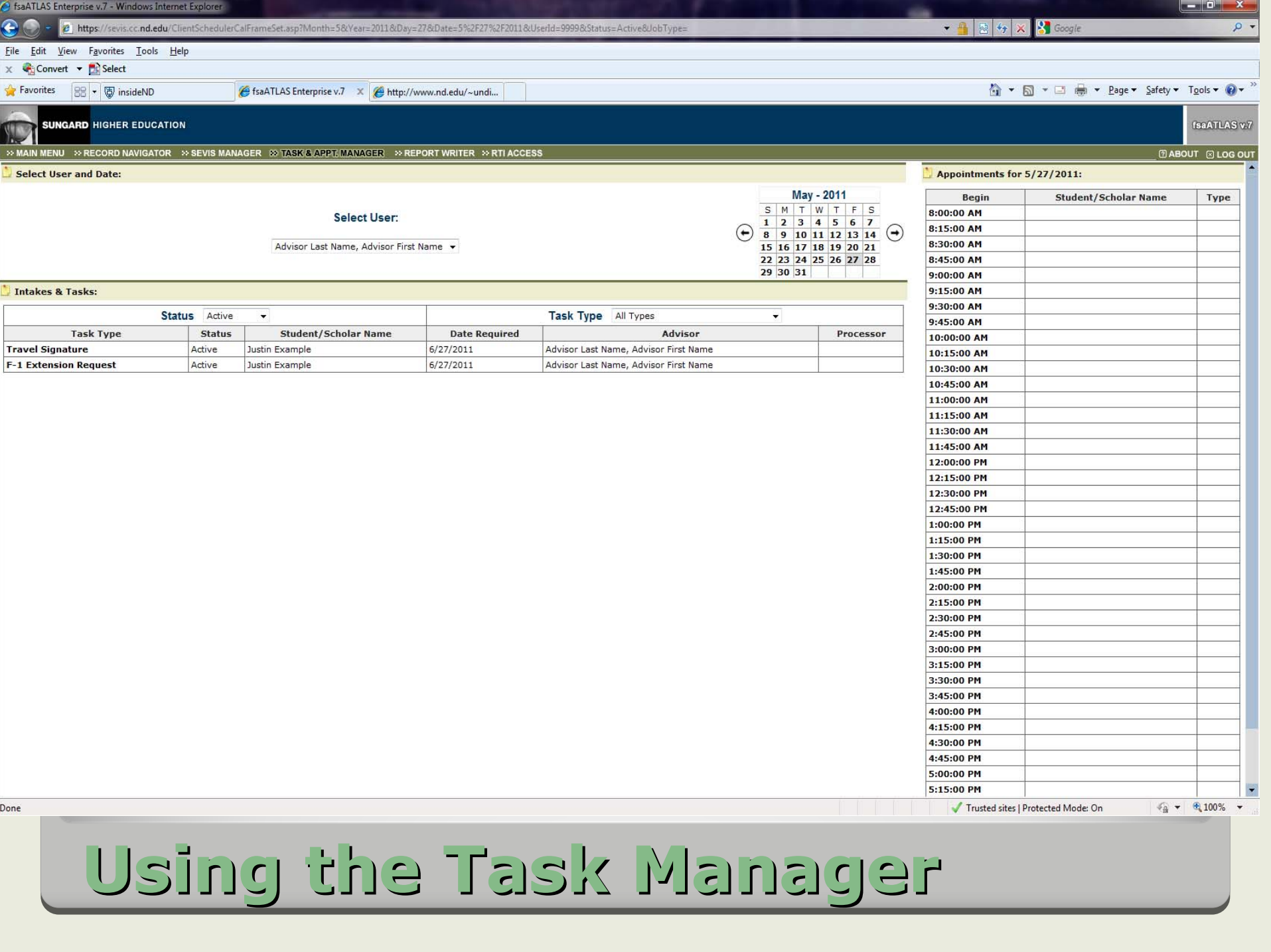
- During down time, staff manages registration
- Hold release (to allow for enrollment)
- SEVIS registration
- Uploading documents into fsaATLAS

- SEVIS registration completed by the end of orientation week
- All documents uploaded within two weeks

New Student Registration



Managing Work Flow



Select User and Date:

Select User:

Advisor Last Name, Advisor First Name

May - 2011

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Intakes & Tasks:

Status: Active Task Type: All Types

Task Type	Status	Student/Scholar Name	Date Required	Advisor	Processor
Travel Signature	Active	Justin Example	6/27/2011	Advisor Last Name, Advisor First Name	
F-1 Extension Request	Active	Justin Example	6/27/2011	Advisor Last Name, Advisor First Name	

Appointments for 5/27/2011:

Begin	Student/Scholar Name	Type
8:00:00 AM		
8:15:00 AM		
8:30:00 AM		
8:45:00 AM		
9:00:00 AM		
9:15:00 AM		
9:30:00 AM		
9:45:00 AM		
10:00:00 AM		
10:15:00 AM		
10:30:00 AM		
10:45:00 AM		
11:00:00 AM		
11:15:00 AM		
11:30:00 AM		
11:45:00 AM		
12:00:00 PM		
12:15:00 PM		
12:30:00 PM		
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3:00:00 PM		
3:15:00 PM		
3:30:00 PM		
3:45:00 PM		
4:00:00 PM		
4:15:00 PM		
4:30:00 PM		
4:45:00 PM		
5:00:00 PM		
5:15:00 PM		

Using the Task Manager

View Task

Client Name Example, Justin
Status Active
Source E-Mail
Department Name Office of Foreign Student Visas
Task Type F-1 Extension Request
Intake Gerth, Laura
Note Need Advisor Form, Dean Form, I-94
Advisor Advisor Last Name, Advisor First Name
Instructions for Processor
Processor
Pick Up In Person
Send e-mail?
E-mail message for Client
Date Started 5/27/2011 11:18:45 AM
Date Required 6/27/2011
Date Completed
 Save Cancel

SEVIS Wizard E-mail Letter Form Note (1) Task Appt. Document

Name	Campus ID	SEVIS ID	Profile Status	Profile Type	Profile SubType	DataLink Active
Justin Example	12345		SEVIS - Active	F-1	Student	No
DOB	8/2/1988		SSN			
Gender	Male		Marital Status			
Country of Citizenship	Russia		Country of Residence			
Country of Birth	Russia		City of Birth			
Create Date	5/27/2011		Last DataLink Sync			

Profile Data

Profile Type	F-1	Profile Subtype	Student
Profile Status	SEVIS - Active		
Start Date		End Date	
School		Academic Department	
Level of Education		Major	
Full-Time Status	Full-Time	Job Title	

Immigration Form

Form Type	Form Description
Date Begins	Date Expires
School	Date Issued

Using the Task Bar

View Task

Client Name: Example, Justin
 Status: Active
 Source: E-Mail
 Department Name: Office of Foreign Student Visas
 Task Type: F-1 Extension Request
 Intake: Gerth, Laura
 Note: Need Advisor Form, Dean Form, I-94
 Advisor: Advisor Last Name, Advisor First Name
 Instructions for Processor
 Processor
 Pick Up: In Person
 Send e-mail?
 E-mail message for Client
 Date Started: 5/27/2011 11:18:45 AM
 Date Required: 6/27/2011
 Date Completed
 Save Cancel

SEVIS Wizard E-mail Letter Form Note (1) Task Appt. Document

QuickView Bio Address Dependents Contacts Profiles Work Auths Custom Forms SEVIS Documents Interactions

Name	Campus ID	SEVIS ID	Profile Status	Profile Type	Profile SubType	DataLink Active
Justin Example	12345		SEVIS - Active	F-1	Student	No

Interactions Log

The list below contains the history of all interactions (notes, tasks, appointments, e-mails) with the individual created within fsaATLAS.

Type	Date	Advisor	Status	Category	Summary
Task	06/27/2011	Advisor First Name, Advisor Last Name	Active	Travel Signature	Still missing I-94
Task	06/27/2011	Advisor First Name, Advisor Last Name	Active	F-1 Extension Request	Need Advisor Form, Dean Form, I-94
Note	05/27/2011	Laura, Gerth	N/A	Immigration Issue	Student met with LGerth on 5/19/2011 to ask about program extension requirements.

Change page: < < Prev Next > > Page 1 of 1, items 1 to 3 of 3.

Using the Interactions Tab

Travel Signature Procedures

General Notes:

- Students are directed to come to the ISO in the afternoon for travel signatures.
- As the primary processor for Travel Signatures, the Office Coordinator may process requests in the morning at his discretion.
- If the Office Coordinator is unavailable, other ISO staff members may complete the request.
- The staff member who signs the travel signature is responsible uploading all documents and forms to fsaAtlas within 48 hours.
- For a travel signature on a dependent document, the **principal** visa holder (F-1/J-1) must complete the form and present the I-94.

Periods of Validity:

F-1 Students and F-2 Dependents During Studies

Situation	Action	Validity for Travel
Initial I-20	Sign issuance and travel signature	12 months
Subsequent travel during studies	Sign travel signature	12 months
Reissue I-20 during studies	Sign issuance and travel signature	12 months
Subsequent travel during studies	Sign travel signature	12 months

F-1 Students and F-2 Dependents On Post Completion OPT

Situation	Action	Validity for Travel
Issuance for Post Completion OPT	Sign issuance and travel signature	Six months
Subsequent travel during OPT	Sign travel signature	Six months
Reissue I-20 during OPT	Sign issuance and travel signature	Six months
Subsequent travel during OPT	Sign travel signature	Six months

I-1 Student and I-2 Dependents During Studies

Situation	Action	Validity for Travel
Initial DS-2019	Sign issuance only	Initial entry only
Subsequent travel after initial entry with same DS-2019	Sign travel signature	12 months
Reissue DS-2019-first time used for travel	Sign issuance only signature	First entry within 12 months
Reissued DS-2019-subsequent travel after first use	Sign travel signature	12 months



I-1 Student and I-2 Dependents During Post Completion Academic Training

Situation	Action	Validity for Travel
First travel after authorization of PC-AT	Sign issuance only	First entry within six months
Subsequent travel after PC-AT authorization	Sign travel signature	Six months
Reissue DS-2019 during PC-AT	Sign issuance only	First entry within six months
Subsequent travel after reissuance of DS-2019 during PC-AT	Sign travel signature	Six months

Procedures:

1. **Student** goes to ISSA website and completes the Travel Signature Request Form.
 - a. https://www3.nd.edu/~undiso/Secure/Travel_Sig.html
 - b. Student will have to log in with net ID and password before granted access to the form.
2. **Student** submits the form by clicking the button.
 - a. Submission will not go through unless mandatory fields are complete.
 - i. If mandatory information is missing, students are told which fields still need to be completed before submission.
3. Form is received in the ISO inbox in the X Drive.
 - a. This form will be located at: X Drive → feedback → Secure → Submitted Form.
 - b. The form will be listed as [Travel_Sig.html\(number\)](#).
4. **Office Coordinator** will check the folder twice a day.
 - a. Double click on the submitted form.
 - b. When the dialogue box appears, check the radio button marked "Select a program from a list of installed programs."
 - c. Click "OK."
 - d. In the next dialogue box, double click on the icon for Microsoft Word.
 - e. Another dialogue box will open; click "OK."
 - f. The returned form will open as a word document.
5. **Office Coordinator** will save the form as a PDF the "Advisor Uploads" folder.
 - a. File should be named: Last name, First name Travel Signature Request [date]
 - b. Change the file type to "PDF."
 - c. Delete the submitted form from the X Drive Inbox.
6. **Office Coordinator** assigns the task to himself until the request is complete or processed.
 - a. In fsaAtlas, use the Record Navigator to locate the student's record.
 - b. In the top tool bar, click on "Task" next to the picture of the clipboard.
 - c. A new task should come up.
 - i. Source-Email
 - ii. Task Type-Travel Signature
 - iii. Advisor-Office Coordinator
 - iv. Pick up-None
 - v. Required Date-Change date to **one month later**.
 - d. Click Save
 - i. A summary of the task will appear

Managing Work Flow

- Creating stock letters and e-mails
 - Advisor Confirmation
 - Dean's Confirmation
 - Incomplete Request
 - USCIS Mail Pick-up
 - OPT Appointment/OPT Packet ready
- Email and Blast Emails from within fsaAtlas
- Pick-up Tasks
 - Managing documents ready for pick up
 - Ensure all staff are aware of pending items
 - Consequences for failure to pickup documents
- Naming Conventions

Managing Work Flow

Typical procedure for a TRAVEL SIGNATURE

Processing Benefits and Requests



Request for Travel Signature

Processing Instructions Travel Signature can be completed in the ISO each week day between 1:00 p.m. and 4:30 p.m. **After you complete and submit this form via email, you MUST come to the ISO with the required documents as listed below.**

All F-1 and J-1 students and their dependents must have a valid travel signature to reenter the U.S. after travelling internationally. Travel Signature are valid for 12 months for F-1 and J-1 students and their dependents. For students on Post Completion OPT, travel signatures are only valid for six months.

Student Information

Today's Date: 6/15/2011

Last/Family Name: Example

First/Given Name: Justin

ND Student ID Number: 123456789

ND E-mail Address: jexample@nd.edu

SEVIS ID Number: N000012345

Telephone Number: 555-555-5555

By typing my INITIALS below I certify that I have read the following statements, and indicate they are correct:

JE I certify that I have not violated my current F-1/J-1 immigration status by accepting unauthorized employment.

https://www3.nd.edu/~undiso/Secure/Travel_Signature_Request.html - Windows Internet Explorer

https://www3.nd.edu/~undiso/Secure/Travel_Signature_Request.html

File Edit View Favorites Tools Help

Convert Select

Favorites https://www3.nd.edu/~undiso/Secure/Travel_Sig...

Required Documentation

By checking each box you indicate that you understand you must bring each of these items to the ISO to obtain the new travel signature.

Current I-94 card

Current/most recent I-20 or DS-2019

Required Information

Please complete the following:

1. Approximate date of departure from the U.S.
2. Expected date of return to the U.S.
3. Destination
4. Are you departing the U.S. for research or study abroad? Yes No
If yes, you MUST complete the Study or Research Abroad Notification Form and have your Academic Advisor complete the Study Abroad Advisor Recommendation form.

Signature

By typing my name below I certify that all information here is accurate and complete. I understand that I must bring the above documents to the ISO to complete the request for a travel signature.

Signature of Student: Date:

Contact Information

Immigration Services Office
121 Main Building
Notre Dame, IN 46556

Phone: 574-631-5243
Fax: 574-631-9698
Email: undiso@nd.edu

Revised 5/2/2011

Done Internet | Protected Mode: Off 100%

Processing Benefits and Requests



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<!-------BEGIN HEADER-----
From:wwwforms@nd.edu<
Date:Wed Jun 15 08:54:25 2011
Host-From: (172.21.134.9)
Originator-AFSid:
-----END HEADER----- -->

From:wwwforms@nd.edu
To: undiso.undiso.1@nd.edu
Reply-To: wwwforms@nd.edu
Sender: wwwforms
Date: Wed Jun 15 08:54:25 2011
X-Mail-Gateway: WWW-FORM-MAIL Gateway
X-Real-Host-From: (172.21.134.9)
X-WWW-Referer:
https://www3.nd.edu/~undiso/Secure/Travel_Signature_Request.html
X-Originator-AFSid:
Subject:Form Feedback for
https://www3.nd.edu/~undiso/Secure/Travel_Signature_Request.html

Todays Date : 6/15/2011

Last/Family Name : Example

First/Given Name : Justin

ND Student ID Number : 123456789

ND E-mail Address : jexample@nd.edu

SEVIS ID Number : N000012345

Telephone Number : 555-555-5555

Employment : JE

Full Course of Study : JE

J1 Insurance :

Documentation : I-94

Documentation : I-20

1. Approximate date of departure from the U.S. : 6/20/2011
2. Expected date of return to the U.S. : 8/15/2011
3. Destination : Russia
4. Are you departing the U.S. for research or study abroad? : No

Signature of Student : Justin Example

```

Processing Benefits and Requests

- When student is present:
 1. Check Interactions tab FIRST
 2. Scan I-94 card
 3. Check I-20
 4. Enrollment verification
 5. Check the submitted Request form
- If all checks out, issue signature and scan signed document for student file
- Combine scan and form; upload
- Mark task as complete

Processing Benefits and Requests

- When student is not present:
 - Create a task
 - List pieces still needed
 - As pieces come in, modify task appropriately
 - Mark task complete when signature has been issued

Processing Benefits and Requests

Typical procedure for an F-1 PROGRAM EXTENSION

Processing Benefits and Requests

- Student submits request
- Office Coordinator
 - Saves request as PDF in upload folder
 - Creates task which lists all pieces still needed with due date one month out
- Academic Advisor fills out recommendation form
 - Student must request this
 - OC sends Academic Advisor copy of form once received

Processing Benefits and Requests

Student Information

Student's Last/Family Name:

Student's First/Given Name:

ND Student ID Number:

Program Extension Information

The expected graduation date is now

Please indicate the reason the student needs a program extension:

- Changed major
- Unexpected research delays or problems
- Changed research topic
- Other

Please provide the actual dollar amounts for the below fields. Immigration Services is required to list this information on the new immigration document. If the department is not providing any funding, please list "0" in the appropriate fields.

The tuition costs for this extension period are \$

The department will provide \$ as a tuition scholarship.

The department will provide \$ as a living stipend.

Advisor Information

Last/Family Name:

First/Given Name:

Academic Department:

ND E-mail Address:

Campus Telephone Number:

Academic Advisor Form



Dean/Representative Recommendation: International Student Program Extension

Student Information

Student's Last/Family Name:

Student's First/Given Name:

ND Student ID Number:

Program Extension Information

The expected graduation date is now

Please confirm the reason that the student needs a program extension:

- Changed major
- Unexpected research delays or problems
- Changed research topic
- Other

Dean Information

Last/Family Name:

First/Given Name:

ND E-mail Address:

Dean Form

- Office Coordinator
 - Sends copy of Academic Advisor form to Dean for their recommendation
 - Once received, confirmation sent back to Dean with copy
- Student submits documents
 - As these come in, Office Coordinator modifies the task to reflect the pieces still needed.

Processing Benefits and Requests

WHEN ALL PIECES HAVE BEEN RECEIVED:

- Office Coordinator
 - Assigns the task to Immigration Advisor, changes date to three days out
 - Combines and uploads all forms and documentation
- Immigration Advisor
 - Reviews forms
 - Issues the benefit to student
 - Uploads any new or changed forms
 - E-mails student to pick up new documents
 - Marks TASK as complete
 - Creates a "PICK-UP" task

Processing Benefits and Requests

- Institutional Support
 - Emphasize pending government change to paperless (SEVIS II)
 - Sustainability
 - Improved record management
- Migrating current active paper records

Loose Ends

- Be prepared to modify forms, processes, and procedures repeatedly.
- Be prepared for faculty resistance to change.
- Have a thorough process for “partial” requests.
- Communicate consequences for those who don't pick up documents.
- Every staff member needs to be sold and solid on the process.

Tips, Tricks, and Challenges



In Conclusion

- Store documents electronically
- Identify and access documents easily
- Intake requests without paper
- Manage office work flow
- Maintain staff notes in records
- Track issued documents pending pick up
- Avoid alienating faculty and staff

Making It Work

- Laura Gerth
 - International Student Advisor
 - lgerth@nd.edu
- Roy Bronkema
 - Office Coordinator
 - rbronkem@nd.edu

Questions?