



# TDS SCHOLAR PORTAL

## Quick Start Guide

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## **ADDING A NEW ADMIN TO THE TDS SCHOLAR PORTAL**

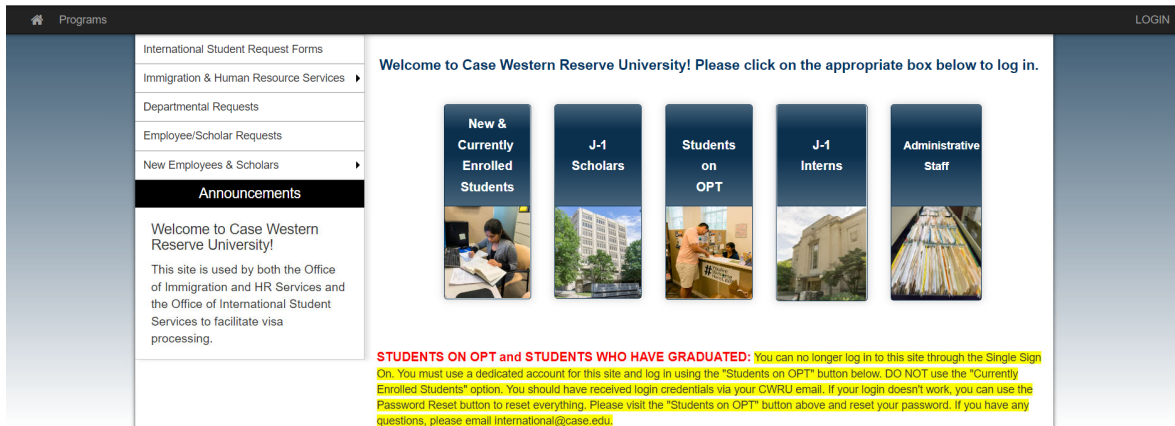
When a new Admin/HRA is hired or acquires visa responsibilities, please email IHRS at [visa@case.edu](mailto:visa@case.edu) with the new admin's name, email, and department. If the admin is replacing someone already in the TDS Scholar system, please let IHRS know this as well. We can copy the permissions and department(s) of the departing admin and apply them to the new admin if we are alerted that the new admin is a replacement.

If an admin is leaving the University, please let IHRS know as soon as possible. We need to update the TDS Scholar Portal so no renewal reminders are missed.

Once an admin is added in the TDS Scholar system, they will receive an email with a link, notifying them that they should log in and access their account.

# LOGIN INSTRUCTIONS

**Visas.case.edu**



Once you navigate to [visas.case.edu](https://visas.case.edu), please select the **“Departmental Request”** option in the left side bar menu.

**Do not log in using any other link. Do not select “Administrative Staff” or the “Login” link in the top right corner. These are logins for student offices and database maintenance employees.**



You will see a list of requests that the department can submit. Feel free to use those requests as necessary, but if you are requesting a visa, please select the “TDS Scholar Portal” link. No other option allows you to request a visa.

## Departmental Requests

### TDS Scholar Portal

*Ready to request or extend a visa? Use the embedded link above to log in here.*

*All current staff should click the link above. When the login page loads, please select "Campus ID Login" and it will send you to the CWRU Single Sign On page. No username/password is required on the sign in page.*

### Green Card Request

*Ready to request a Green Card? Use the embedded link above to submit your request here.*

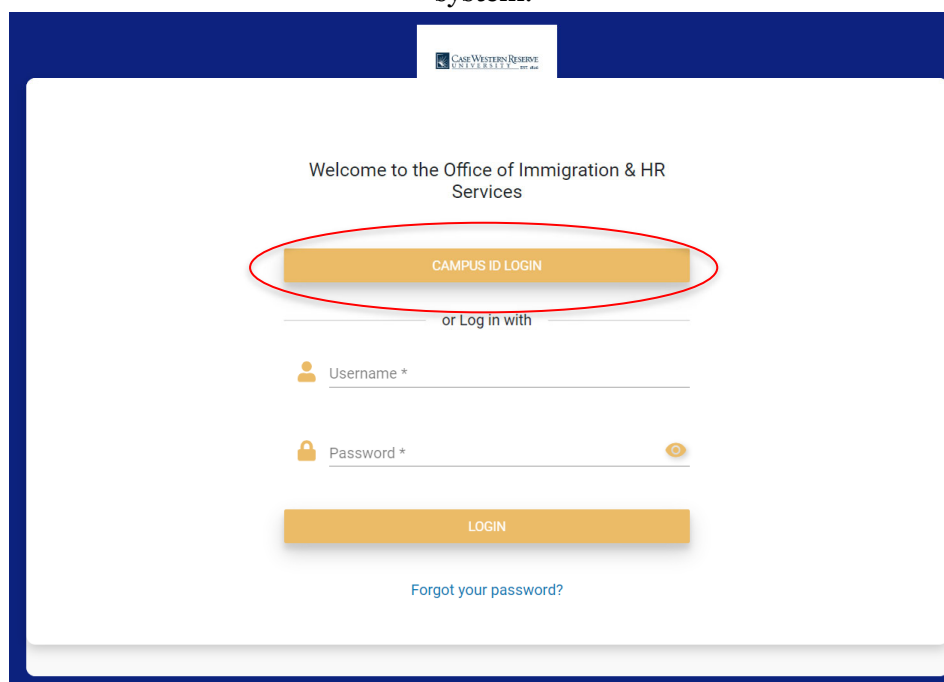
*Only the department may request a green card on behalf of a Case Western employee. Requests by the employee directly will not be honored without departmental approval.*

### Need Something Else?

*Please contact IHRS at [visa@case.edu](mailto:visa@case.edu).*

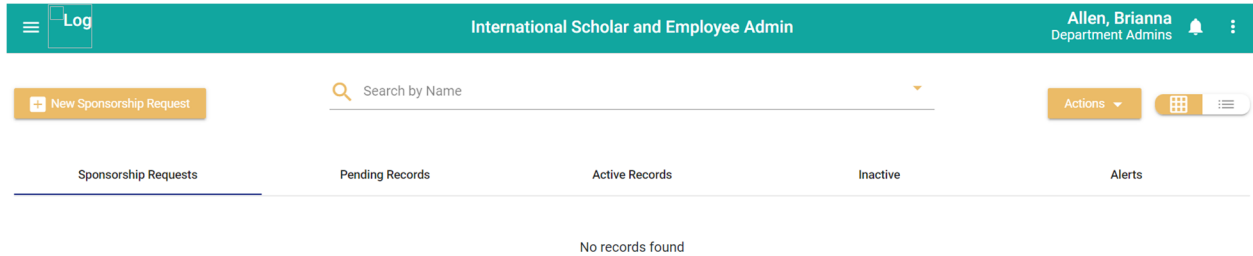
*Where is the link? Please click on either "TDS Scholar Portal" or "Green Card Request" for the link which will automatically redirect you to your destination.*

You will be taken to the TDS Scholar Portal login screen. Select “CAMPUS ID LOGIN” to use your Case Western Reserve University username (your work email without the “@case.edu” part) and the password. This login option will allow you to use single sign-on to access the system.

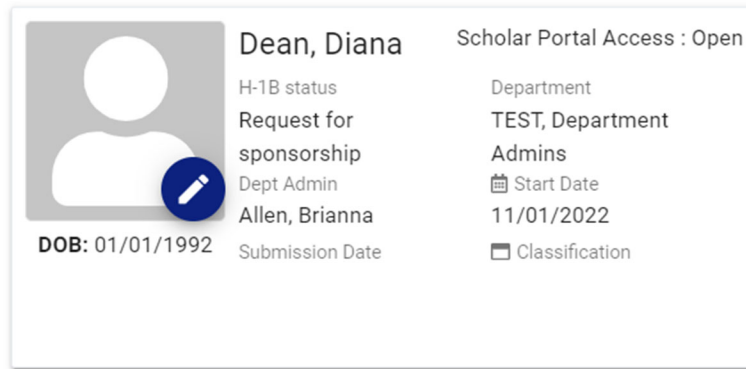


# QUICK START GUIDE

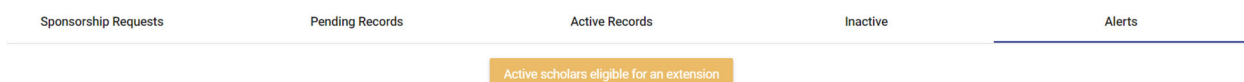
After you log into the TDS Portal, your Dashboard should look something like this.



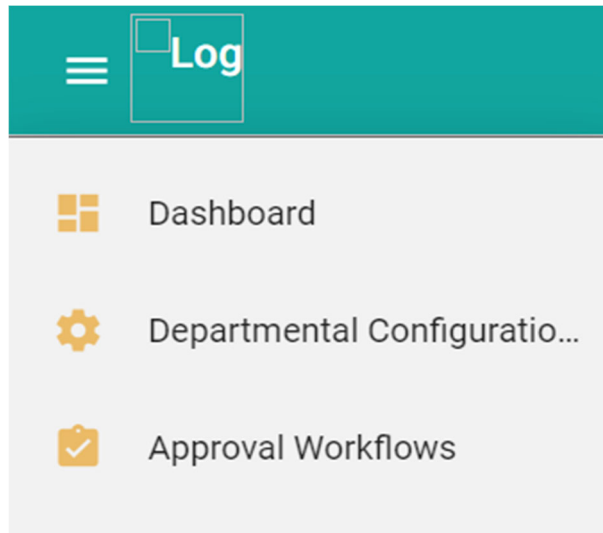
This is a Scholar/Employee “Card”. You should see all of your Department’s scholars and employees, each with their own card, in the “Active Records” section.



You will see 5 tabs on your Dashboard. The first one, “Sponsorship Requests” will show all of your pending sponsorship request submission. Once IHRS approves the request, your scholar/employee’s card will move to “Pending Records”. Once the visa is processed and your scholar or employee’s start date occurs, their card will move to the “Active Records” tab. For those who terminate, resign or whose visas lapse naturally when the department decides not to extend their visa will show on the “Inactive” tab. The “Alerts” tab will show any scholars or employees whose visas are soon to expire. The TDS Portal will also send automated reminder emails to both you and the employee/scholar about 6-8 months before the visa is set to expire. That way IHRS and the department has enough time to prepare and execute the visa extension without fear of any lapse in work authorization.



In the upper left hand corner of the dashboard, you will see a drop down menu (a “hamburger” button). If you click this, it will give you a few options. The Dashboard option will bring you back to the home screen and the “Departmental Configuration” button will allow you to input different worksites.



We recommend speaking with IHRS if your department would like to build an “Approval Workflow”. In most cases, IHRS will build this function in as upper management requests that functionality. An Approval Workflow allows a department to choose a sequence of approvers that must confirm the visa is allowed to proceed. **We do not recommend attempting to create an Approval Workflow without IHRS guidance.**

As was previously mentioned, the “Departmental Configuration” button will allow you to input different worksites. For instance, if your department has three different labs, you could enter those labs as separate worksites and any visa request in the future will give you the option to prefill one of those worksite locations. That may save you some time, but it is your choice whether you wish to put in worksite locations. The screen looks like this.

Contact Information Configuration

First Name  
Brianna

Last Name  
Allen

Email  
brianna.allen2@case.edu

Department Admins

Title

Phone

0/10

Complete Campus Address

J-1 Specific - Site of Activity Information

← Back to Dashboard


Update

## NEW SPONSORSHIP REQUESTS

**Important Notes: Please follow your School/Department's internal approval procedures prior to submitting a visa request. In addition, please ensure that the offer/invitation has been extended to the scholar/employee prior to submitting the visa request. We will be contacting the candidate directly to obtain further information and documents from them.**

We recommend having the PI fill the "PI Form" prior to beginning this process. The form can be supplied by IHRS, you can find the form linked in the "New Sponsorship Request" instruction box (see below), or you can access the form [here](#). When we receive a request, we require the form linked above to be uploaded into the TDS Scholar system before we can finalize any visa processing. Please consult with your School/Department to determine their internal processes.

Instructions

 Sponsorship Request Instructions

**Ready to Request a Visa?**

- Please use [this form](#) obtain all necessary information, departmental signatures and approvals prior to submitting your request in the TDS Scholar system.
  - Once the request is approved for processing, please upload this form into the "Other" category in the Department tab of TDS Scholar.
- Please fill the questions below and click "Submit" below to start the process.


When you are ready to start the visa process, you do not need to which type of visa is appropriate for your position. All you need to do is submit a "New Sponsorship Request". The button can be found on the top left side of your Dashboard screen.



You will be required to enter some preliminary information. Please note that IHRS does not expect you to have all of the information for your scholar at this stage in the process, so take note of which fields are marked as required (\*) and which are optional. If you do not have the information to complete an optional question, you can leave it blank.


The first information box asks for the scholar or employee's name. If the person is already a CWRU employee/scholar, you can look up their name. If not, please input their Family Name (Surname or Last Name) and Given Name (First Name).


Provide Name of Scholar/Employee

 Search By Name, Email

 Scholar/Employee Email \*

 Scholar/Employee Family Name \*

 Given Name \*

 Middle Name



The next box asks questions about the start and end date for the person's employment or appointment. Please note that IHRS will communicate with you if there is an issue with the dates. Generally, J1s are issued for up to 5 years of time and H1Bs can be issued for up to 3 years of time.

The Hiring Authority is your School/Department. The Hiring Authority Name is the PI/Supervisor who will be supervising the scholar/employee. We also ask whether the department has a proposed visa type. If this is typically a position in which you hire people on J1 visas, then select J1 or whichever visa type you believe is most appropriate. Note that IHRS will confirm with you whether the visa is appropriate and reserves the right to change the visa type to one that is appropriate for the position. Additional information is asked, such as whether the person will be paid, the number of hours per week that the person will be working. An estimate is fine.

Proposed Start Date (MM/DD/YYYY) *	Proposed End Date (MM/DD/YYYY) *	Proposed Visa Type *
Hiring Authority Department *	Hiring Authority Name *	
Hiring Authority Title	Will scholar/employee be paid?	<input type="button" value="Yes"/> <input type="button" value="No"/> <input type="button" value="Unspecified"/>
How many hours a week will scholar/employee be engaged in proposed activity? <small>(numeric data only: 0-9 and decimal point)</small>	Has the beneficiary ever been a J-1 exchange visitor or J-2 dependent of a J-1 exchange visitor?	<input type="button" value="Yes"/> <input type="button" value="No"/> <input type="button" value="Unspecified"/>

The Other Information box is mostly optional, but please input the information is you have it available.

Other Information	
Gender	Date of birth (MM/DD/YYYY)
Country of birth	Country of citizenship

The HRA or staff member who is filling out this request and who presumably will be the one facilitating the visa process is considered the Department Contact. In most cases, this will be your information.

Department Contact Information		
Host Department *	Contact Name *	Phone
Email	Complete Campus Address	

We also ask what kind of position this person will be filling.

Sponsorship requests

Sponsorship Request Form -

Position Type\*

Select your answer \*

If you are satisfied with the information you have provided, please hit the “Submit” button. Please note that any unsubmitted requests will not be saved or submitted to IHRS, so it is very important to ensure that you click the “Submit” button before exiting the TDS Portal.



Viola! You’ve done it! You have submitted a New Sponsorship Request.

**Please note this is not the end of the process. We require further information from you.**



Once IHRS approves the request, you will be copied on an email to the scholar/employee, inviting them to the TDS Scholar system. IHRS will also be in touch shortly with you to confirm what type of visa is possible and the process going forward. You will also need to re-enter the TDS Scholar system to provide additional information and documentation for your request (see below for further instructions).

If you have any questions in the meantime, you can always reach out to IHRS at [visa@case.edu](mailto:visa@case.edu).

## **J1 REQUESTS**





Once IHRS and the department decide to proceed with a J-1 Request, the scholar's Card will move to the "Pending" tab.

IHRS will email the scholar directly go into TDS Scholar and complete their personal information. The department will also have some additional information to fill in the three tabs circled below:






	<b>Name</b>	Allen, Brianna	
	<b>Visa Type</b>	J-1 	
	<b>Program dates</b>	10/01/2022 - 10/01/2023	
	<b>Status</b>	draft	
	<b>SEVIS ID</b>		
	<b>SEVIS Program Code</b>		
	<hr/>		
<b>Department</b>	Exchange Visitor	<b>Additional Information</b>	<b>Documents</b>

### **The Department Tab**

The Department tab asks more questions about the appointment and worksite location. Some of the information will auto-fill based on your New Sponsorship Request submission. In general, though, you will be the Department Contact. Please ensure your information is filled correctly.

Department Contact Information			
	Host Department		Contact Name
	Email		Phone
brianna.michelle.allen@gmail.com		Complete Campus Address	
		Test1	

The Faculty Sponsor is generally the PI/Supervisor for the scholar. Again, some of this may auto-fill, but please ensure the information is filled out completely and correctly.

Faculty Sponsor Department Information			
	Faculty Sponsor Department		Faculty Sponsor Name
Department Admins		Test1	
	Faculty Sponsor Title		Faculty Sponsor Email
Test1			
	Faculty Sponsor Phone		

The Site of Activity is where the scholar will primarily be working. It is understandable that some people, especially Professors/Lecturers, may move between classrooms or work spaces, but please give us the location where we are most likely to find this person in the event of an ICE, SEVIS or DOL audit. This is very important for compliance and audit purposes.

Site of Activity Information

Site of Activity Name \*

Primary Site of Activity?

Yes

No

Choose existing Site of Activity:

Address Line 1 \*

Address Line 2

City

State

Zipcode \*

**When Case Western sponsors a visa, we implicitly agree to submit to random governmental audits. Should ICE or another government entity come to your department, NOTIFY IHRS IMMEDIATELY.**

Please indicate whether the scholar will primarily be engaging in research, teaching, a mix of the two or select Other if they are doing something different. Very rarely do people engage in something different on a J1 visa. If this is the case for your scholar, please alert IHRS to ensure they will qualify for the J1 visa.

Exchange Visitor Information

In which academic field will the visiting scholar be teaching or conducting research?

Will the visiting scholar be primarily:

☐ Conducting research

☐ Teaching

☐ Conducting research and Teaching

☐ Other

Description of proposed research or teaching activities

0 characters left

Proposed Job title

Scholars may be paid by Case Western or another entity, such as a fellowship, scholarship or they may even come and use their personal savings for their visit. If you know the source of the J1 scholar's funding, please put the amount in the appropriate space.

Funding Information

Please provide all sources and amounts of support for the visiting scholar and dependents. Additionally provide documentation of funding not provided by the institution. A letter from the visiting scholar is not sufficient documentation.

Funding from Institution: Provide a copy of the offer letter to the Scholar that includes funding information.

\$ Amount

Scholar's government: Provide funding documentation from the governmental source

\$ Amount

Sponsoring Organization: Provide funding documentation from the sponsoring organization

\$ Amount

Personal Funds: Provide a letter (in English) with a signature from a financial institution

\$ Amount

Other: Provide documentation of funding

\$ Amount

Case Western is considered the “Sponsoring Organization”. This is tricky because “Funding from Institution” is very similar, however this option refers to funding like a scholarship from their University or a Fellowship from another organization like Fulbright, for instance. This is also an optional question, so if you do not know, you may leave it blank.

## OPR/Speedtype

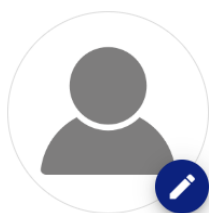
J-1

**OPR/Speedtype -**

Please provide OPR/Speedtype for shipping fees.\*

For a J1 visa, we only use the Speedtype for international FedEx shipment of the DS-2019. If the scholar is inside of the U.S., we typically request that they come pick up the document. No other fees are required.

## Documents Tab



**Name** Allen, Brianna  
**Visa Type** J-1 ⓘ  
**Program dates** 10/01/2022 - 10/01/2023  
**Status** draft  
**SEVIS ID**  
**SEVIS Program Code**

Department

Exchange Visitor

Additional Information

**Documents**

The Documents tab includes documents that both the Department and the Scholar must upload. All required documents with some linked forms are present in the Instructions box. These instructions can be found at the top of the “Department” tab.

### Instructions

#### J-1 Department Instructions

Both the department and scholar will have independent questionnaires to complete and documents to submit. Please note that J-1 documents cannot be processed until all information and documents are submitted.

Departments will need to complete the "Department" tab and submit the following documents:

1. Offer, invitation, or appointment letter
2. No Patient Contact letter (if scholar is a foreign M.D.)
  - [Incidental Contact Letter Template](#) (for those who may come into contact with patients)
  - [No Patient Contact Letter Template](#) (for those who will have no patient contact)
3. Proof of English Language Proficiency or [English Proficiency Checklist](#)
4. [Export Control Certification Form](#)

If you have any questions about the process or the TDS Scholar System, please contact IHRS at [visa@case.edu](mailto:visa@case.edu).

Generally, the department is responsible for uploading the following documents:

1. Invitation/Appointment Letter
2. Proof of English Language Proficiency
3. Export Control Certification Form
4. Financial Support Documentation
5. PI Form

The department should upload the offer/appointment letter as proof of Financial Support only if the scholar will be paid by Case Western. If the scholar is not paid by CWRU, the scholar will be responsible for uploading the appropriate documentation.

Once you are satisfied that the information is true and complete, please remember to click the “Update” button. No information will be saved or forwarded to IHRS until and unless you click the “Update” button.

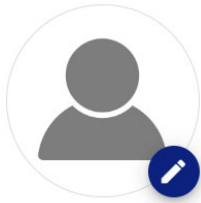
An orange rectangular button with a white floppy disk icon on the left and the word "Update" in white text on the right.

**Do not click “Submit to ISS Admin”. This will close the portal to the Scholar/Employee. IHRS will close the portal once all information is submitted.**

## H1B REQUESTS

Once the department and IHRS decide to proceed with an H1B visa, the employee will be notified via email to enter the TDS Scholar Portal and complete parts of the required Beneficiary and Document tabs.

The department will need to complete the “Department” tab and upload some required documents in the “Documents” tab.



**Dean, Diana**  
**H-1B**  
Start date: 11/01/2022  
Classification:

\* Request for sponsorship Pending on 10/27/2022

Department

Beneficiary

Additional Information

H-1B Information

Processing

Documents

Department Contact Information

### **The Department Tab**

Some of this information will autofill from the Sponsorship Request, but not everything will, so please ensure you fill the required questions fully.

The Department Contact Information box refers to the HRA/Admin who will be handling the visa paperwork (generally, the person filling this form will be the Department Contact).

Department Contact Information

Host Department  
Department Admins

Contact Name  
Allen, Brianna

Phone

Email  
brianna.allen2@case.edu

Complete Campus Address

The Information box asks questions about the salary, full or part time status of the position, the position title and more. Please note the Position Description is optional here. The department will need to upload a job description in the Documents tab later, so do not feel like you must enter a lot of information here.

Proposed Start Date

11/1/2022

Proposed End Date

11/30/2022

Offered Wage

123456

(numeric data only: 0-9 and decimal point)

Position Title

TEST

Position Type

FULL TIME

Position Description

TEST TEST

586 characters left

Position Requirements

TES TEST TESTTEST

238 characters left

The Prevailing Wage box helps us determine the “prevailing wage” (or the minimum amount the Department of Labor requires us to pay people on an H1B visa). Please answer these questions honestly and completely.

Job Location

Address Line 1

TEST

30 characters left

Address Line 2

34 characters left

City

TEST

State

Georgia

Zip Code

12345

Will the Beneficiary be required to work at an additional job location in the U.S.?

Yes

No

Unspecified

Degree Required

In which field?

100 characters

Can the degree be in a related field?

Yes

No

Unspecified

Is post-degree experience required?

Yes

No

Unspecified

Specify any required certification or professional licensing

4000 characters

Is this a postdoctoral training position?

Yes

No

Unspecified

Is travel required for the position?

Yes

No

Unspecified

Does the position supervise full-time employees?

Yes

No

Unspecified

Are there other conditions affecting the pay rate? Please explain

4000 characters

From time to time, IHRS may reach out to your department and report that the offered salary does not meet the prevailing wage requirement. Please note this is a Department of Labor requirement and we are required to pay the prevailing wage. If the department is unable/unwilling to pay the prevailing wage, IHRS will not be able to proceed with the H1B filing. If you have any questions, please ask IHRS at [visa@case.edu](mailto:visa@case.edu).



The Actual Wage box helps us determine the “actual wage” of other employees in the same position. The Department of Labor requires us to pay not only the prevailing wage, but also equal to all others in the same job position within the department.

**Please disregard this box. It is hard coded into the Department tab and cannot be disabled. This requests sensitive information that IHRS does not require for visa processing.**

Please note this tab is optional.

Actual Wage

Are there employees in the department with the same title and qualifications?

Yes

No

Unspecified

Are there employees in the department with the same title and qualifications and duties comparable to those of the position you are hiring for?

Factors to determine comparability are:

• Work experience • Individual qualifications • Education

• Job function • Specialized knowledge • Other business factors

If there are similarly employed persons in the department, please list below:

Enter person's name and salary.

Add

Name	Salary	Actions
Name	Salary	

However, the “H-1B” information box is required to determine the “Actual Wage” information.

H-1B

Actual Wage Information -

Number of Employees in the Same Position (only in the hiring department)\*

10 digits remaining

numeric data only: 0-9

Lowest Wage Paid to Others in the Same Position\*

200 characters remaining

Highest Wage Paid to Others in the Same Position\*


200 characters remaining


If you are satisfied that the information is correct and complete, please remember to click “Save”. No information will be saved or submitted to IHRS if you do not click the Save button.





## The Documents Tab

The documents tab shows you a short list of required documents that the department must submit. **If you do not have these documents handy, we have provided templates with this guide. Please consult the Forms & Templates section to obtain the forms/templates you need to upload.** The “Other” upload button is required if the department opts to upload the “Actual Wage” worksheet.

Other	^
<input type="radio"/> Other	 Upload

Letters	^
<input type="radio"/> Support letter <input type="radio"/> Copy of offer letter	 Upload

Export Control Certification Form	^
<input type="radio"/> Export Control Certification Form	 Upload

Position Description	^
<input type="radio"/> Position Description <input type="radio"/> Other	 Upload

If you are satisfied that the information is correct and complete, please remember to click “Save”. No information will be saved or submitted to IHRS if you do not click the Save button.

 Save

**Do not click “Submit to ISS Admin”. This will close the portal to the Scholar/Employee. IHRS will close the portal once all information is submitted.**

## **OTHER VISA TYPE REQUESTS**

Please speak with IHRS. While there are many types of visas, CWRU sponsors J1s and H1Bs most often. Only in compelling circumstances would we consider other visa types. Please consult with IHRS before advising any candidates or onboarding employee/scholars to ensure we are able to sponsor other types of visas for employment, teaching and/or research.

## **DEPARTING EMPLOYEES/SCHOLARS**

It is of the utmost importance that you alert IHRS when an employee/scholar leaves the University for any reason (including resignation, termination, retirement and/or lay offs).

Please email [visa@case.edu](mailto:visa@case.edu) to let IHRS know that a scholar or employee is departing the University as soon as you know their end date.

**Please note that some visa types require that Case Western withdraw the visa shortly after the employee/scholar's termination. Failure to do so in a timely fashion will result in required backpay to the employee/scholar from the date of their termination to the date the visa is withdraw. Departments are responsible for backpay. Thus it is imperative to contact IHRS as soon as you know someone is leaving.**

## **FORMS & TEMPLATES**

*Links to the Forms & Templates below can be found on our [TDS Scholar](#) page.*

### **TDS Scholar Portal Resources**

- TDS Scholar Quick Guide

### **General Forms & Templates**

- Export Control Certification Form
- Immigration Statuses Chart
- Position Information Form

### **J1 Forms & Templates**

- J-1 & J-2 Request Checklist
- English Language Interview Form
- No Incidental Contact Letter Template
- Incidental Patient Contact Letter Template

### **H1B Forms & Templates**

- H-1B Checklist for Amendments & Extensions (for current employees on H1B)
- H-1B Checklist for Changes of Status or New Hire (Inside of the U.S.)
- H-1B Checklist for New Hire (Outside of U.S.)
- H-4 & EAD Checklist for Spouse/Children of H1B holders