Pre-Arrival Guide for International Visiting Faculty and Researchers

Welcome to UMass Lowell!

On behalf of the entire University, we are glad that you chose the University of Massachusetts Lowell (UMass Lowell) and look forward to welcoming you to our campus.

The International Students & Scholars Office (ISSO) is here to assist you with your immigration-related matters during prior to and during your stay. This Pre-Arrival Guide was designed to provide critical information pertaining to immigration regulations, the visa application process, and your immigration-related responsibilities once in the United States. This guide will also serve as a tool to assist in your arrival and settlement in the United States.

Whether you are coming to UMass Lowell from your native country or are transferring from another US institution, please review this guide carefully.

With warm regards,

Maria Conley
Executive Director of International Administration
# TABLE OF CONTENTS

Pre-Arrival Checklist.................................................................................................................Page 4

Applying for a J-1 / J-2 Visa.......................................................................................................Page 4

Applying for an H-1B / O-1 Visa...............................................................................................Page 6

Applying for a TN Visa...............................................................................................................Page 6

Entering the United States.........................................................................................................Page 9

Transportation to Lowell from Logan International Airport..................................................Page 9

Housing Resources....................................................................................................................Page 10

J-1 Health Insurance Requirement............................................................................................Page 13

J-2 Dependent Work Authorization Information......................................................................Page 16

Mandatory Orientation for All New Int’l Scholars.................................................................Page 16

Estimate of Expenses................................................................................................................Page 17

Tax Information / Social Security...............................................................................................Page 19

Setting up Electricity, Telephone, Gas Service, Etc...............................................................Page 20

Banking Information................................................................................................................Page 21

Mail / Post Offices......................................................................................................................Page 24

Calling Cards..............................................................................................................................Page 24

Transportation around Lowell..................................................................................................Page 25

UMass Lowell Recreation Center.............................................................................................Page 27

Shopping Resources................................................................................................................Page 27

Massachusetts Public Education for Students K-12...............................................................Page 31

J-1 Return Residency Requirement / Bars..............................................................................Page 32
**TABLE OF CONTENTS (CONT.)**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment in the J—1 Scholar/Professor Category</td>
<td>34</td>
</tr>
<tr>
<td>J-1 Program and Key Definitions</td>
<td>34</td>
</tr>
<tr>
<td>J-1 Visa Category General Info</td>
<td>36</td>
</tr>
<tr>
<td>H-1B Visa Category General Info</td>
<td>36</td>
</tr>
<tr>
<td>TN Visa Category General Info</td>
<td>37</td>
</tr>
<tr>
<td>O-1 Visa Category General Info</td>
<td>37</td>
</tr>
</tbody>
</table>
PRE-ARRIVAL CHECKLIST

After receiving your visa document:

- Review this Pre-Arrival Guide;
- Verify that all the information on your visa document is correct. Please inform your UMass Lowell sponsoring department if your travel plans prevent you from arriving to the US prior to the start date listed on your visa document (found on either your DS-2019 or I-797 Approval Notice);
- Pay the I-901 (SEVIS Fee), found online at https://www.fmjfee.com/i901fee/ - be sure to print a copy of your payment receipt to bring to your eventual visa interview;
- Purchase or make plans to purchase medical insurance coverage. The U.S. Department of State requires all individuals who enter the United States in J-1 status to have medical insurance for themselves and any accompanying J-2 dependents. Information about the health insurance requirements can be found in this guide;
- Arrange for your housing needs. Although ISSO is unable to assist you in arranging housing, this guide provides an overview of housing resources;
- Arrange for transportation from the Boston (Logan) airport to your hotel or apartment

I-901 - SEVIS (Student & Exchange Visitor Information System) FEE

All J-1 visa applicants must pay the SEVIS fee of $180. The SEVIS fee must be paid at least three business days prior to the scheduled visa interview at the U.S. Consulate. For most individuals, the SEVIS fee can be paid by electronically completing the Form I-901 and paying with a credit card through the Internet at www.fmjfee.com. You will need the information from your DS-2019 in order to complete the SEVIS Fee payment.

Please print the electronic receipt immediately after payment has been made. You must show the receipt to the consular officer at the time of the interview. Spouses and dependent children (J-2s) do not pay this fee. The SEVIS fee is not a visa application fee. It is used to operate and maintain the SEVIS database. The fee is non-refundable, even if the visa application is denied.

APPLYING FOR A J-1 / J-2 VISA

A valid J-1 visa is required to enter the United States on the Exchange Visitor Program. For information on processing times and procedures, visit the U.S. Department of State at travel.state.gov.

- Before you make your visa appointment, you are required to pay the $180 SEVIS Fee (I-901 Fee). Please check this website for details on how to pay the fee on-line,
https://www.fmjfee.com/i901fee/. Be sure to print the receipt of payment, as you will need to provide it at the U.S. Embassy or Consulate at the time of your interview.

- Follow the necessary visa application form(s) and fees, as outlined in the Non-Immigrant Visa Application section of the embassy you are planning to visit, http://www.usembassy.gov/. There may be a reciprocity fee for your country, please check this list for details, http://travel.state.gov/visa/frvi/reciprocity/reciprocity_3272.html.

The following is generally required for the J-1/J-2 visa application:

- Signed Form DS-2019(s). A separate form is required for all visa applicants. The J-1 should sign the bottom of the first page of all forms and submit them for the visa application. The DS-2019(s) will be returned to you to present at the U.S. port of entry.
- Receipt showing payment of the SEVIS fee (J-1 visa only).
- Payment of the visa application fee, and appropriate visa application forms (see U.S. Consulate webpage), for each visa applicant.
- Passport(s) valid for at least 6 months into the future, for each visa applicant.
- Proof of ties to your home country. Consult the website of your local U.S. Consulate/Embassy for suggestions.
- Proof of financial support. You must be able to verify the total funds indicated on the DS-2019 with a personal bank statement and/or a sponsor’s official statement of support. If you are receiving payment from UMASS Boston, you may request a letter from the host department that specifies your position and salary.
- Two passport-size photos for each visa applicant is required
- J-1 Invitation letter from the host department at UMass Lowell
- Marriage certificate and birth certificates (in English with attached translation) of children carrying their own passports (J-2 visa only).

When your visa is approved, the consular officer will return Form DS-2019 to you. You should present it at the U.S. port of entry. Sometimes the Form DS-2019 is returned to you by the U.S. Embassy in a sealed envelope. If this happens, please do not open the envelope. It will be opened by an Officer at the Port of Entry to the U.S.

At the Port of Entry, the officer will return Form DS-2019 to you. The officer will provide each admitted nonimmigrant traveler with an admission stamp on their passport. It should state “J/l – D/S”. Learn more about the electronic I-94 card, which will be accessible to you only at the Port of Entry, by visiting this website, www.cbp.gov/I94. Be sure to print your I-94 card as soon as you are able to after arriving in the U.S.
You should always keep Forms DS-2019 and a copy of the electronic I-94 card information with your passport. They are your only proof of J-1 status, and you will need them for such purposes as extending your permission to stay in the U.S., work permission, and applying for a Social Security card. Keep all forms, including DS-2019, permanently.

**APPLYING FOR AN H-1B / O-1 VISA**

While many new H-1B or O-1 employees will change status within the United States, some will need to first obtain an H-1B visa from a US Embassy abroad before entering the US in H-1B status. Further, the first time a new H-1B or O-1 that has changed status within the US has left the US, they will need to obtain their new visa stamp at the US Embassy abroad.

Please consult UMass Lowell’s outside immigration counsel as to the necessary steps to applying for an H-1B or O-1 visa. You will need the following when applying for the visa abroad:

- Form I-797C Approval Notice for H-1B or O-1 status;
- UMass Lowell offer or invitation letter;
- Evidence of recent pay statements from UMass Lowell, if applicable;
- Photocopy of the entire H-1B petition – will be provided by attorney*

* The copy of the petition will include all documents related to your eligibility for H-1B/O-1 status, as well as UMass Lowell’s ability to sponsor an H-1B /O-1 employee.

**APPLYING FOR A TN VISA**

The North American Free Trade Agreement, encompassing the former U.S.-Canada Free Trade Agreement, created a temporary employment category that is available only to Canadian and Mexican citizens.

In order to qualify for this category, a Canadian or Mexican citizen must be qualified to practice in a profession approved by the NAFTA program (which typically includes accountants, engineers, lawyers, pharmacists, scientists, and teachers.) The International Students & Scholars Office can provide you with a list of these professions. The Mexican or Canadian citizen will need to have a job offer from a U.S. employer to engage in business activities at a professional level.

**Part I – Documentation Needed**
The applicant must be in possession of a letter on the company’s official letterhead from the prospective U.S. employer. The letter must affirm the following:

- Person’s name;
- Date of birth;
- Person’s prospective job title;
- Brief Job Description;
- Required Educational Credentials for the position (must possess a minimum of a Bachelor’s degree);
- Whether or not any state and/or Federal licenses are necessary for the position;
- Prospective salary to be paid;
- Anticipated employment dates (employment cannot go over three years from the date the person enters in TN status).

In addition, the above-mentioned letter from prospective employer, candidate should present:

- Mexican or Canadian passport (passport must be valid for 1 & ½ years into the future);
- Academic Credentials;
- Resume;
- Licenses, if applicable;
- Birth Certificate;

Part II – Preparing to Enter the U.S.

Canadian Citizens can apply for TN status at any Class A port of entry. The fee for the application at the port of entry is approximately from $50 - $100. If found admissible, the applicant will be issued an I-94 card for a maximum period of three years and can bring his spouse and minor unmarried children. The dependents of the TN visa will be issued the visa classification of TD. These persons will be admitted for the duration of the TN principal alien’s stay. They may attend school in the U.S. but are not eligible to work or receive any form of funding from any U.S. source. Canadian citizens do not apply at a U.S. Embassy/Consulate, they process their TN visa at the port of entry.

Mexican Citizens can apply for TN status at a U.S. Embassy/Consulate in Mexico. You need to present the documentation listed above in Part I. You will need to also present it at the port of entry. In addition, you will need to submit the appropriate visa application forms to the U.S.
Embassy/Consulate. Once you have obtained the TN visa stamp in your passport, then you can enter the U.S.

*Mexican TN Visa vs. Canadian TN Visa* – what are the differences in the application process:

- A Canadian citizen may apply at the port of entry to the U.S. by presenting all of the required documentation listed on Part I above.
- A Mexican citizen must first apply for a TN visa stamp in their passport at a U.S. Consulate or Embassy in Mexico by presenting all the documentation listed on Part I and Part II (b) above, then present the documentation from Part I above, again at the U.S. port of entry.

**Part III – Applying for an Extension of TN Status**

A TN professional can apply for extensions of stay to work for the same employer in increments of three years without limit on the number of extensions that may be granted. Permission to change employers must be obtained from the U.S. Citizenship & Immigration Services (USCIS) prior to any transfer to a new company.

In order to obtain an extension or submit a request to change employers, a TN visitor may have his/her employer file a Form I-129 with the appropriate USCIS Center. It takes 4-5 months to process by mail. Or, a TN visitor may leave the U.S. and make a new application. Canadian citizens would apply at the port of entry when returning to the U.S. Mexican citizens would apply at a U.S. Embassy/Consulate in Mexico. In either event, citizens of both countries need to present the same documentation as they did the first time applying for TN status, using an updated letter from their U.S. employer.

**Part IV – General Notes**

- The TN visa classification cannot be used for self-employment in the U.S.
- TN visa holders are subject to Federal, State and Social Security taxes.
- TD visa holders (dependents of TN) are not authorized to work in the U.S. or receive any form of financial support from U.S. sources.
  - TD visa holders are permitted to study in the U.S., while accompanied by the TN.
  - TD visa holders are only in valid status while the TN is in valid status.
**ENTERING THE UNITED STATES**

International scholars and their dependents are only permitted to enter the United States no sooner than 30 days prior to the start date on their visa document. J-1 visa holders, specifically, must arrive by the start date on their DS-2019 at the latest. Please ensure that your travel plans satisfy this requirement.

Please present the following documents to the U.S. Customs and Border Protection (CBP) officer at the U.S. port of entry:

- Passport(s) containing a valid J-1/H-1B/O-1 visa (or dependent visas for accompanying family members);
- Signed Form DS-2019(s) for you and any accompanying family members, or I-797 Approval Notice;
- Proof of financial support (same as the documentation presented at the U.S. Embassy or Consulate);
- Invitation / appointment letter from your UMass Lowell sponsoring department

**TRANSPORTATION TO LOWELL FROM LOGAN INTERNATIONAL AIRPORT**

Your Hiring Department at UMass Lowell may be able to assist you with transportation from the airport. If not, then the following may be helpful.

In case you need to secure your own transportation from the airport:

Logan International Airport in Boston is the closest international airport to Lowell. Make sure that you have enough small bills in US currency ($1, $5, $10, $20) to pay for your transportation. Most van services will accept a credit card, but for bus, subway and the commuter train you will need cash. There are several ways by which you may get to Lowell from Boston, Logan International Airport:

1) **By Taxi** – this will cost over $100.

2) **Public transportation** is also possible but not advisable given that you will have luggage and would have to take more than one train and/or bus to reach Lowell. But if you do choose to take some mode of public transportation, we recommend you take a taxi from the airport to North Station in Boston. From North Station take the "Commuter
Train" to Lowell. After arriving in Lowell take a taxi to get to your final destination. This option should cost approximately $35-$50.

3) The most convenient way to reach UMass Lowell from the Airport is to contact one of the following:

**TWC AIRPORT LIMO**
John DaSilva - President
33 Nabnasset Street
Westford, MA. 01886
Phone: 978-692-8880

**FLIGHT LINE**
Phone: 1-800-245-2525
URL: http://www.flightlineinc.com
Provides 24 hour service/7 days per week
If you use your credit card, you can provide Flight Line with the UMass Lowell Corporate Account Number - UML23000, which will apply a discounted rate.

**JT'S AIRPORT SHUTTLE SERVICE**
John Warren - Owner
27 Royalston Avenue
Lowell, MA. 01851
Phone: 978-256-1307

Please confirm with your sponsoring department and ISSO when you have arrived safely to Lowell

**HOUSING RESOURCES**
Temporary Housing Accommodations:

**Umass Lowell Inn & Conference Center***
50 Warren Street
Lowell, MA 01852
Phone: 978-934-6927
Fax: 978-934-6924
http://www.uml.edu/Public_Affairs/Special_Events/ICC/default.html

**Courtyard by Marriott**
30 Industrial Avenue, East
Lowell, MA 01852
Phone: 978-458-7575
Fax: 978-458-1302

**Commonwealth House**
87 Nesmith St., Lowell, MA
Phone: 978-452-9071
This Hotel is on the UMass Lowell Campus and very convenient to stay while you look for permanent housing. When you make your reservations make sure to tell them that you will be a UMass Lowell International Scholar. You can mention that you referred to them by the UMass Lowell International Students & Scholars Office.

If you require temporary accommodations for a few weeks or more, you'll need kitchen facilities as it gets very expensive to eat out every day. Short term accommodations with kitchen facilities are available at:

**Hawthorn Suites**
Drum Hill Technology Center  
25 Research Place  
North Chelmsford, MA  
Phone: 978-256-5151  
Toll-free (within the US): 1-800-527-1133
Fax: 978-256-6633

**Radisson Hotel and Suites Chelmsford**
10 Independence Drive  
Chelmsford MA 01824  
Phone: (978) 256-0800  
Toll-free (within the US): (888) 201-1718
Fax: (978) 256-0750
RHI_Clms@radisson.com

You can find furnished and unfurnished apartments in Lowell and the surrounding area, but rental costs and convenience (distance to campus, public transportation, shopping, etc.) can vary significantly.

**Renting an Apartment**
Decisions you will need to make:

- What is your annual budget, including monthly rent, heat, hot water and broker’s fee?
- How close do you want to live to UMass Lowell?
- Do you want to live alone or have roommates?
- If you’re bringing a family, and have children that need to attend public school, please see page 27
- Are you looking for a furnished or unfurnished apartment?

Other considerations:

- What is the lease commitment? (For your first rental, upon arrival, it is advisable not to sign a one-year lease until you are more familiar with the renting process, location, etc.)
- How safe is the neighborhood?
- Are heating and hot water included with your monthly rent?
- Is there a laundry facility?
- Will the apartment be noisy (Is it near an elevator or entry? Are the walls thin?)?
• Is the apartment, especially the kitchen and bathroom, in good and clean condition?
• Are you allowed to keep your bicycle in your apartment or in the basement?
• Are there any security features (particularly for ground floor apartments)?
• What is the overall size of living space?
• If you have roommates, how will the utility bills be shared?
• Is there sufficient natural sunlight and/or overhead light fixtures?
• Is the apartment close to public transportation?
• Is there a grocery store or shopping nearby?

The classified section in the local newspaper, The Lowell Sun, (http://www.lowellsun.com) is a good resource of information regarding apartments for rent.

Also, there are several rental agencies that can help you find an apartment. A few of them are listed below. (Please note this list is provided for your convenience and does not constitute an endorsement of these agencies by the University.)

**CRAIGS LIST**
URL: [www.craigslist.com](http://www.craigslist.com)

**RENT.COM**
URL: [http://www.rent.com](http://www.rent.com)

**UNIVERSAL APARTMENT RENTALS, INC.**
114 University Ave.
Lowell, MA 01854
Phone: 978-454-9999
Email: G_laganas@yahoo.com

**LAKESHORE REALTY**
Helen McCobb - Property Manager
2000 Lakeview Avenue
Dracut, MA. 01826
Phone: 978-957-4442
Fax: 978-957-4381

**HERITAGE PROPERTIES**
Chris Petersen - Financial Officer
1201 Westford Street
Lowell, MA. 01851
Phone: 978-458-1000
Fax: 978-458-6000
URL: [http://heritageprop.net/](http://heritageprop.net/)
Email: cpetersen@heritageprop.net

**PRINCETON PROPERTIES**
Terence F. Flahive
678 Princeton Blvd.
Lowell, MA. 01851
Phone: 978-458-8700
Fax: 978-458-8701
URL: [http://www.princetonproperties.com/](http://www.princetonproperties.com/)
Email: tflahive@princetonproperties.com

**APARTMENTS.COM**
URL: [http://www.apartments.com](http://www.apartments.com)

**RENTNET.COM**
URL: [http://www.rentnet.com](http://www.rentnet.com)
To apply to rent an apartment, you will need:

- Proof of your UMass Lowell affiliation (job offer or invitation letter)*
- Bank statement, loan statement, or evidence of how you will pay your rent
- First and last month of rent

*ISSO can also provide confirmation of the same should your landlord require it

You may also need:

- Security deposit, which can be up to one month’s rent
- Broker fee, which can be up to one month’s rent (a fee paid to secure housing)
- Rental fees for an apartment can range from $800 to $1250 per month (excluding utilities such as gas, electricity, telephone service, etc.) depending on the size of the apartment. If you share an apartment, which many people do, the cost may be reduced significantly.

Legal Rights and Responsibilities - Visit the Residents section of www.mass.gov for information on:

1) Renting in Massachusetts;
2) Tenant/Landlord Rights and Responsibilities;
3) Housing Consumer Education Centers;
4) How to File Consumer Complaints;
5) Face-to-Face Mediation Program;
6) United States Postal Moving Guide

J-1 HEALTH INSURANCE REQUIREMENTS

U.S. Department of State regulations require all J-1 Exchange Visitors to have medical insurance for themselves and any accompanying J-2 family members for the duration of their program.

Your health insurance must meet the following requirements for both you, and any J-2 dependents:

1) At least $50,000 for Medical Evacuation to the home country*
2) At least $25,000 for Repatriation of Remains*
3) $100,000 per accident or illness
4) A deductible not to exceed $500 per accident or illness
* Please note that the university pays for #1 and #2 above for all J scholars (i.e., Medical Evacuation and Repatriation of Remains). This is automatic and you need not take any action to obtain insurance to comply with #1 and #2 above. But IT IS YOUR RESPONSIBILITY to take care of coverage for #s 3 and 4 above.

**YOU ARE LEGALLY RESPONSIBLE to maintain health insurance coverage for #3 and #4 above.**

**If you ARE paid by UMass Lowell** AND are also eligible to receive health insurance benefits, then be sure to apply for health insurance coverage as instructed by the UMass Lowell Benefits’ Office. Please note that not all employees of UMass Lowell are eligible for health insurance benefits. If you are paid by UMass Lowell and are unsure of your health insurance eligibility, then feel free to contact the UMass Lowell Benefits’ Office with your questions at benefits@uml.edu or call them at 978-934-4100. They are located at 600 Suffolk Street, Suite 302, Wannalancit Business Center, East Campus, Lowell, MA 01854. If you are paid by UMass Lowell and you are eligible for UMass Lowell health insurance coverage, it will not happen automatically unless you enroll for it by completing the necessary paperwork for the UMass Lowell Benefits’ Office.

**If you ARE NOT Paid by UMass Lowell** or if you are paid by UMass Lowell and ARE NOT BENEFITS ELIGIBLE, then you MUST purchase health insurance coverage that meets the J-1 regulatory requirements as per #3-#4 above.

The following is a “suggested” list of insurance companies that offer insurance coverage meeting the minimum J-1 insurance requirement. It is your responsibility to choose an insurance provider that best fits your personal situation/needs:

**Part I** - The companies listed in Part I are more reasonably priced because they offer less Comprehensive insurance coverage.

**Compass Benefits Group** –
www.compassbenefits.com
Email: jfleming@compassbenefit.com
Phone: 781-356-1999

**HTH Worldwide Insurance Services** –
www.hthstudents.com or
www.hthworldwide.com
Email: studentinfo@hthworldwide.com
Part II – the following insurance providers are more costly and offer more comprehensive coverage:

**Blue Cross and Blue Shield of Massachusetts**
The Landmark Center
401 Park Drive
Boston, MA 02215-3326
1-800-262-BLUE
Website: www.bcbsma.com
Service area: State of Massachusetts

**Fallon Community Health Plan**
10 Chestnut St.
Worcester, MA 01608
(508) 799-2100
1-800-868-5200
Website: www.fchp.org
Service area: Eastern and central Massachusetts

**Harvard Pilgrim Healthcare**
93 Worcester Street
Wellesley, MA 02481
617-509-1000
Website: www.harvardpilgrim.org
Service area: Massachusetts, New Hampshire and Maine

**Tufts Health Plan**
333 Wyman Street
P.O. Box 9112
Waltham, MA 02454-9112
Part III – Select your own insurance company
This site will inform you of all health care options available within the U.S. state you reside in, www.healthcare.gov

J-2 DEPENDENT WORK AUTHORIZATION INFORMATION

J-2 dependents may apply for work authorization, and can contact ISSO to coordinate the process. Each applicant must first receive work authorization approval from USCIS prior to beginning work.

Please note that J-2 dependents with work authorization are fully subject to Federal, Social Security and Medicare taxes and are not eligible for tax treaty benefits.

MANDATORY ORIENTATION FOR ALL NEW INT’L SCHOLARS

The U.S. Department of State requires that your program sponsor provide you with an orientation. At the orientation session, an ISSO scholar advisor will validate your arrival in the Student and Exchange Visitor Information System (SEVIS) database. This notifies the Department of Homeland Security that you have arrived with the proper status, have begun your J-1 exchange visitor program and changes your SEVIS record to ACTIVE status.

Please appear at ISSO drop-in hours for your mandatory orientation held during the following times:

Tuesday – Thursday
9AM-11AM and 2PM-4M

You should bring the following to your orientation during your first week on campus:

- passport(s);
• I-94 card printed out at [www.cbp.gov/I-94](http://www.cbp.gov/I-94) (will only be available once you’ve entered the US);
• Visa document or Approval Notice(s);
• Proof of insurance coverage;

Dependent family members are welcome to attend the orientation with you; however, the primary beneficiary (scholar/professor) is the only individual who is required to attend. Note: If your family members do not accompany you to the orientation, please remember to bring their documents and insurance for verification.

**ESTIMATE OF EXPENSES**

Below is an estimate of approximately how much money you should plan to have in order to afford basic living expenses during your time at UMass Lowell:

**Living Expenses**: $21,600/yr. ($1,800/mo.)

**Dependent Expenses**:
- Spouse - $4,800/yr. ($400/mo.)
- Child - $2,400/yr. ($200/mo.)

Health Insurance costs - $300-$600 per month depending on person’s age, marital status and type of insurance provider. If you are entering into a UMass Lowell paid and benefitted position, please contact the UMass Lowell Benefits Office, [http://www.uml.edu/HR/Employee-Benefits/default.aspx](http://www.uml.edu/HR/Employee-Benefits/default.aspx) to obtain information on the cost to you. J-1 Exchange Visitors will be required to maintain a minimum level of health insurance. Please check page 10 for more detailed J-1 health insurance requirements.

It is important to note that you may not accept employment outside of UMass Lowell or outside of the objective listed in your UMass Lowell Invitation Letter. Therefore, you should not expect to obtain U.S. funding in excess of that indicated on your Visa Document (Form DS-2019 or Form I-797 Approval Notice, etc.)

All Visitors to the UMass Campus will be required to obtain a UMass Lowell Identification Card (ID card) at a minimal cost, [http://www.uml.edu/UCAPS/UCard/New-Faculty-Staff.aspx](http://www.uml.edu/UCAPS/UCard/New-Faculty-Staff.aspx)

If your funding is coming from UMass Lowell:
• There may be a delay of up to one month before your first paycheck is received. Because of this, it is advisable for visitors to arrive with at least $3,000 to cover initial expenditures and deposits. A bank draft or cashier’s check in U.S. dollars (payable to yourself) is a convenient way to bring money to be deposited with a local bank. Since the bank draft or check will not clear for your use until 15-30 days after deposit, it is recommended that you bring part of this amount in traveler’s checks or cash.

• If your funding is coming from UMass Lowell, you will be taxed. Please contact the UMass Lowell Payroll Services, http://www.uml.edu/HR/Payroll-Services/Contact-Us.aspx with your taxation questions so you can plan accordingly. They will also be able to provide you information on tax treaties which apply to some countries. General information on foreign taxation also resides within the UMass Lowell Payroll website, http://www.uml.edu/HR/Payroll-Services/International-Employees.aspx

• If you intend to drive and park on the UMass Lowell campus, there will be a campus parking permit fee, http://www.uml.edu/UCAPS/Parking-Decals-and-Permits/Parking-Decals-and-Permits.aspx

RENTAL COSTS
Most owners require one month's rent in advance. You should be prepared to pay up to three or four months' rent before occupying an apartment (first and last months in advance, a refundable security deposit, and possibly a realtor's fee). Please arrive with sufficient funds (preferably in travelers' checks, not cash) for these initial expenses. Rent for a one-bedroom apartment generally ranges from $1,000 to $1,500 per month or more depending on the condition and location of the unit. The cost of a two-bedroom apartment varies anywhere from $1,300 to $1,800 per month or more. Furnished rooms, with or without cooking privileges, cost from $700 to $900 per month or more. The estimated monthly cost to share an apartment with a roommate ranges from $700 to $1000 per month or more per person. Utilities, such as heat, hot water, gas, and electricity, may range from $120 to $450 per month.

UTILITIES
The major utilities are telephone, electricity, hot water, and heat (electric, oil, or gas)

TELEPHONE
The average cost for local telephone service ranges from $30 to $80 per month. Long distance calls are billed separately. The cost to install a new telephone ranges from $37 to $90
ELECTRICITY
The voltage used in the United States for small appliances is 110-V (60 cycles). If you bring appliances which use 220-V to 240-V, you must use an adapter. Adapters are available for purchase; however, they are expensive. Monthly electricity costs vary from $30 to $100 per month depending on building size and usage.

HEAT
If heat is not included in your rent you should expect to pay from $90 to $350 per month, depending on the size of your apartment or house. To keep fuel costs to a minimum, thermostats could be set to about 65º F during the day and 55º to 60º F at night or when you are not at home during winter months.

PUBLIC SCHOOLS
The public schools that your children will attend are determined by the city you live in. Note that immunization records are required to enroll children in Massachusetts public schools. School transcripts are also helpful (though not required) for placement of children into appropriate grade levels. For details regarding Massachusetts’ public schools, http://www.doe.mass.edu/. You may also check the Massachusetts Assessment Comprehensive System (MCAS) by district, http://profiles.doe.mass.edu/.

CLOTHING
New England winters are very cold and you will need warm outer clothing and boots. Unless you own these items, it is usually easier and more economical to purchase them after you arrive. Winter coats vary in price from $70 to $300, depending on quality and materials. Winter boots cost from $50 to $150. Good quality used clothing is available at lower prices. Lightweight clothing is needed for the Boston area's hot, humid summers.

Above living expenses estimation is based on the estimated costs of health insurance, apartment rental costs, utility bill payments, etc.

TAX INFORMATION / SOCIAL SECURITY
As in most countries, the tax laws in the United States are complex. Tax treaty benefits, Social Security taxes and filing requirements depend on your visa status, the purpose of your visit, the number of days you will be in the United States and the history of your prior visits.

Taxation of Exchange Visitors
It is hard to generalize about specific tax situations. Under normal circumstances, visitors in J-1 status do not pay Social Security, or Medicare, taxes until they have been in the U.S. for two calendar years. However, U.S. source income is normally subject to federal income tax withholding at a 10-14% rate, or at a 30% rate for one-time payments for independent contractor services. If your country has a Tax Treaty with the United States, then a portion of your income is generally exempt from tax withholding for a certain period of time specified by the treaty.

Please contact Vanntha Sann, Payroll International Tax Treaty Specialist, for all queries related to taxation:
Vanntha_Sann@UML.edu
978-934-3539

Social Security
A Social Security Number (SSN) is required for payment and taxes in the United States. Instructions on the SSN application procedure is discussed at your scholar orientation. You cannot file for a SNN until you have completed your scholar orientation. Please review the ISSO webpage discussing Social Security and obtaining the SSN at:
http://www.uml.edu/ISSO/Employment/ss-card.aspx

Other General Information:

1) A UMass Lowell Identification Number is NOT a Social Security Number
2) You are permitted to open a bank account without a Social Security #, by presenting the bank teller with your passport/visa documentation. You may ask the bank teller for a W-8 Form, to complete, which permits you to open a bank account without a Social Security Number.

SETTING UP ELECTRICITY, TELEPHONE SERVICE, GAS SERVICE, ETC.

Acceptable Forms of Identification when you are new to the US:

As a general rule, you need to present two forms of identification to set up any of the above. In the U.S., it is common for companies to ask for a Social Security # or a Driver’s License. Since most of you will not have these immediately upon entering the U.S., you may want to present the following:
(The International Students & Scholars Office is always willing to write you a letter when necessary and to speak to a utility company on your behalf.)

- Passport
- Credit Card
- If no credit card available, you may also use your UMass Lowell ID along with your passport
- Visiting Scholars may want to present their UMass Lowell Invitation Letter

If living in Lowell – To set up Electric & Gas Service for your apartment:

**National Grid** – 978-725-1000  (Toll-free # is 1-800-322-3223)
You can also do the set up on-line www.nationalgridus.com, visit the “Services Orders” link of this site to Start and Stop Services.

There are two Electric companies that service Massachusetts. They are National Grid and N*Star. As a general rule most of the towns surrounding Lowell would be covered by the National Grid mentioned above and Boston and surrounding Boston area towns would be covered by N*Star or a combination of both.

**Eversource** – 1-800-592-2000  www.eversource.com
To set up Electric Service if you live in Boston or some of the towns surrounding Boston. You can also set up service by visiting the “Accounts Management” link of their website to start or stop service. This company does not set up gas – that would still be National Grid at 1-800-322-2223.

To set up Telephone, Internet, Cable Television

If living in Lowell and most areas surrounding Lowell

**Verizon**, for other areas in Massachusetts, http://www.verizon.com – 1-800-922-0204

**BANKING INFORMATION**

One of the first things that you will need to do when you arrive in the area is to open a bank account. There are many banks in the Lowell area, some of which offer special student accounts. Information about banking services can be obtained from bank staff at the branch...
offices. In addition to the banks listed at the end of this section, you can also go to the Greater Lowell Chamber of Commerce website and search for additional local banks at http://www.glcc.biz/Members_Cat.aspx?CAT=33

To open a bank account, you will need:

- Passport
- UMass Lowell ID and invitation letter from hiring department
- Foreign address
- Local address
- Your deposit (a sum of money required to open the account)

When you open your bank account, make sure to ask any questions you may have about purchasing and payment protocol in the US. Also, have them clarify all fees and rates they may charge for certain transactions. For example, most banks will charge a fee for use of non-bank Automated Teller Machines (ATM).

Note that some businesses prefer certain methods of payment over others and may restrict what they accept from their customers. Methods of acceptable payment in the US include:

- Cash
- Credit or debit card (e.g. Visa, Discover, Mastercard)
- Check
- Money Order or Bank Check

Note: **You do not need to have a Social Security # to open a bank account.** Until you obtain a Social Security #, you simply need to complete Form W-8 at the bank. All banks have this form. Some bank tellers are not aware of it, so you may need to inform them. The International Students & Scholars Office will assist you with the Social Security Application process upon your arrival.

The following local bank listings and locations are suggestions only, and do not reflect an endorsement by our office. Visit their respective websites for more information.

**Bank of America** (There is a Bank of America ATM on every campus.)
http://www.bankofamerica.com
Phone: 1-800-841-4000
501 Bridge Street, Lowell, MA 01850
Credit cards are widely used in the US. You may receive offers from banks, stores or in the mail to apply for one. Although they are convenient, they do come with some costs, which include interest rates and fees attached for late payment. Make sure you carefully read all terms of agreement and verify all details before accepting any offers. You have the right to refuse any offer you do not want or are unsure about.

Be wary of potential scams involving the stealing of identity, bank information or credit card information. Please review the following link for more details:
MAIL / POST OFFICES

The U.S. Post Office most convenient to the campus is listed below (it is close to the UMass Lowell Athletics Facility/Tsongas Arena on East Campus) and reachable by campus shuttle:

155 Father Morissette Boulevard,
Lowell 978-934-0997
Opened 7:30am – 5:30pm on Monday – Friday
Saturday – 7:30 – 2:00pm

Things to Remember:

• Be sure to put your name on the mail box of your new apartment
• Every time you move, provide the International Students & Scholars Office with new address
• Complete a Change of Address card at the Post Office. You can do this in person or on-line through a credit card payment, as per information below.

The US Postal Service official website is, http://www.usps.com/
You can take care of many postal service transactions at above site, including changing your address on-line. Check the section of “All Products & Services” section of their website for a list of all on-line services.

PRE-PAID PHONE CALLING CARDS

Prepaid calling cards are an inexpensive way to call overseas and can be used with a payphone, cell phone or landline. Calling cards are available at many locations in the United States, including convenience and discount department stores.

One of the most student recommended calling card companies is http://www.nobelcom.com. You can purchase a prepaid calling card from the United States to over 200 countries worldwide.

You can also purchase a calling card plan from one of the telephone companies. The issuing company bills you at a later date. Some major credit card companies will offer a calling card option when you apply. To apply for a calling card, call any of the telephone companies listed in
the phone book. The major companies are AT&T (1-800-222-0300); MCI (1-800-950-5555); and Sprint (1-800-877-7746).

TRANSPORTATION AROUND LOWELL

Transportation via bus to closest shopping centers:

1. Take Broadway Bus #6 (South Campus) or Pawtucketville Bus #7 (North Campus), inbound to Kennedy Center Train Station, Lowell
2. From the front of Dugan Hall Bus Stop on Broadway Street, at UML South Campus,
   - Take outbound bus from the Kennedy Center Train Station to shopping center of choice:
     - Tewksbury Bus (Bus #12) goes to Rte. 38 Shopping
       - Stores Located on Rte. 38 in Tewksbury, MA
         - Market Basket Grocery Store, Pets Plus, Donna’s Donuts, Homegoods, Walgreens, Tewksbury Paint & True Value, Main Street Liquors, Friendly’s Ice Cream & Restaurant, Advance Auto Parts, Farm Valley Foods, Blockbuster Video, Walmart (further down the street from this shopping Center – ask bus driver), Dollar Tree,
     - North Chelmsford Bus to Westford Street (Bus #5) or Middlesex Street (Bus #17) goes to Drum Hill Shopping
       - Stores Located on Drum Hill Rd. Lowell, MA
         - Walmart, Payless Shoes, Dunkin Donuts, Radioshack, Sears, Carvel Ice Cream & Bakery, GameStop, FedEx, Quiznos, Autozone, I Party, Sherwin Williams Paint & Wallpaper, Small World Communications, Starbucks, Panera, Moe’s Southwest Grill, D’Angelos, Damien’s Dancewear, Applebees, Verizon Wireless, McDonald’s, Mattress Giant, Taylor Rental, Annie’s Bookstore, Bank of America ATM, Paper Store, CVS/Pharmacy, Market Basket Grocery Store, etc.
   - Burlington/Lahey Bus (Bus #14) will go to Burlington Mall (a major shopping center) http://www.simon.com/mall/?id=146

3. Bus Fares - $1.00 each way
4. Student Monthly Pass - $20.00 (can be purchased at the Kennedy Center Train Station)
5. Lowell Regional Transit Authority, http://www.lrta.com/index.html, for additional transportation information
Transportation Via Train from UML

1. Take Broadway Bus #6 (South Campus) or Pawtucketville Bus #7 (North Campus), inbound to Kennedy Center Train Station, Lowell
2. Train ticket may be purchased at the front desk to the left when you enter the station
3. Fares:
   - $6.75 each way
   - $13.00 round trip
4. Train goes inbound to North Station Boston, MA stopping at North Billerica, Haverhill, Wilmington, Anderson/Woburn, Mishawum, Winchester Center, Wedgemere, & West Medford
5. www.mbta.com

Transportation Via Bus to Social Security Office

1. Take Broadway Bus #6 (South Campus) or Pawtucketville Bus #7 (North Campus), inbound to Kennedy Center Train Station, Lowell
2. Take Downtown Circulator Outbound Bus (Bus #9) to downtown Lowell
3. Bus drops off at Lowell District Court
4. Walk to the end of the road with the Lowell District Court on your right hand side to Warren Street
5. Social Security Office is located at 151 Warren St., .16 miles from Lowell District Court

Bicycle Rentals

<table>
<thead>
<tr>
<th>UML Rec Center</th>
<th>UML Bike Shop</th>
</tr>
</thead>
<tbody>
<tr>
<td>978-934-3401</td>
<td>978-934-1932</td>
</tr>
<tr>
<td>Daily Rentals Only</td>
<td>Fixes Bike Parts</td>
</tr>
</tbody>
</table>

Goodale’s Bike Shop

www.goodalesbikeshop.com
14-B Broad Street
Nashua, NH 03064
603-882-2111

Bicycle Shops

Chelmsford Cyclery
www.chelmsfordcyclery.com
30 Chelmsford St
Chelmsford, MA 01824
978-256-1528

**UMASS LOWELL RECREATION CENTER**

All UMass Lowell students and scholars are eligible to use the Campus Recreation center at:

100 Pawtucket St
Lowell, MA 01854
978-934-2348

**Hours:**
Monday – Thursday 6:30am-11:00pm
Friday – 6:30am-9:00pm
Saturday – 9:00am-8:00pm
Sunday – 12:00pm-10:00pm
*Schedule changes for breaks and summer

**SHOPPING RESOURCES**

Below, please a guide to where you can find various types of retail, grocery, furniture stores, etc. If you need assistance locating a specific store, please do not hesitate to contact ISSO:

**Used Furniture Stores in Lowell**

**Angel's Above Thrift Shop**
99 Mammoth Rd., Lowell
978-452-4833
*Sometimes receives furniture & house wares
No Delivery

**L&N New & Used Furniture**
604 Middlesex St., Lowell
978-323-4455
*Furniture Only
Offers Delivery
Fi Office Inc.
144 B rangeway Rd, Billerica 01862
978-275 6465
*Mainly Office Furniture
Offers Delivery

Other Used Furniture Stores close to Lowell

Goodies Thrift Store
762 Boston Road, Billerica
978-667-5666

Shanks Mare Thrift Shop
306 Boston Rd., Billerica
978-663-9933

All Saints Thrift Shop
10 Billerica Road, Chelmsford
978-250-1765

Salvation Army Thrift Shop
625 Main St., Wilmington
978-988-9488
*Sells dishes, kitchen utensils, etc.

Shopping – Furniture & House wares

Wal-Mart
www.walmart.com
333 Main Street
Tewksbury, MA
978-851-6265

66 Parkhurt Rd
Chelmsford, MA
978-452-3831

Bed, Bath & Beyond
www.bedbathandbeyond.com
Burlington Gateway Shopping Ctr.
3 Abbott Park Burlington, MA
781-272-4588

Macy’s
www.macys.com
1300 Middlesex Turnpike
Burlington Mall
Burlington, MA
781-272-6000

Crate and Barrel
www.crateandbarrel.com
Burlington Mall
Burlington, MA
781-270-3600

Office Supplies

Staples
www.staples.com
265 Chelmsford St  
Chelmsford, MA 01824  
978-256-1828

**Drugstores**

**CVS Pharmacy**  
www.cvs.com  
1815 Middlesex Street  
Lowell, MA  
Store Phone: 978-458-4621  
Pharmacy: 978-458-4621

**Walgreens**  
www.walgreens.com  
54 Plain St  
Lowell, MA  
Store: 978-453-3640  
Pharmacy: 978-453-7538

35 Merrimack St  
Lowell, MA  
Store Phone: 978-454-1000  
Pharmacy: 978-454-1000

1161 Bridge St.  
Lowell, MA  
Store Phone: 978-453-0820

**Supermarkets**

**La Utuadena Market**  
11 Concord Street  
Lowell, MA  
978-459-4440

**Bangkok Market**  
179 Chelmsford St  
Lowell, MA  
978-452-5852

**One Stop International Market**  
35 Bridge Street  
Lowell, MA  
978-459-6199

**That Luang Market**  
1126 Middlesex Ave  
Lowell, MA  
978-452-6940

**Palika Bazar**  
1290 Westford Ave  
Lowell, MA  
978-441-1505

**Demoulas Market Basket**  
11 Wood Street (Broadway Street)  
Lowell, MA  
978-458-8015
331 Fletcher Street
Lowell, MA
978-851-8000

1235 Bridge Street
Lowell, MA
978-454-0361

V-Mart International Market
123 Church St
Lowell, MA 01852
978-710-6237

Hannaford Supermarket
www.hannaford.com
777 Rogers Street
Lowell, MA
978-466-7862

66-2 Drum Hill Shopping Center
Chelmsford, MA
978-459-9304

Used Car Dealers

David Ducharme’s Auto Sales
190 Lincoln St, Lowell, MA
(978) 459-3329

Karman Auto Sales
1418 Middlesex St
Lowell, MA 01851
(978) 459-7307

Hamel Brothers Service Incorporated
(978) 458-8888
157 Pawtucket Blvd, Lowell, MA

Gervais Kia - New & Used Cars
6 industrial Ave
Lowell, Ma 01854
(978) 454-5696

Lowell Used Auto Sales
(978) 454-4444
131 Tanner St, Lowell, MA

Ira Toyota
468 Main St,
Tewksbury, MA 01876
(978) 863-0001

Star Motors
(978) 454-2232
124 Gorham St, Lowell, MA

Advanced Auto Sales
(978) 455-4807
147 Cambridge St,
Lowell, MA 02851

Chelmsford Street Auto Sales
(978) 452-9154
202 Chelmsford St, Lowell, MA

Belvidere Motors
(978) 452-2922
65 Rogers St, Lowell, MA
Unique Auto Sales & Service  
(978) 654-6950  
658 Broadway St, Lowell, MA

Louis Garage Automobile Sales  
(978) 459-2848  
263 Appleton St, Lowell, MA

Moes Twins Auto Sales  
(978) 319-4581  
147 Cambridge St, Lowell, MA

Scenic Auto Sales  
(978) 452-3136  
859 Gorham St, Lowell, MA

Chelmsford Street Motors  
(978) 459-2222  
360 Chelmsford St, Lowell, MA

Scenic Motors  
(978) 453-2945  
220 Tanner St, Lowell, MA

Bay State Auto  
(978) 458-9431  
418 Chelmsford St, Lowell, MA

Jarek’s Auto Sales  
(978) 452-3104  
248 Tanner St, Lowell, MA

Drum Hill Ford  
(978) 452-3900  
1212 Westford St, Lowell, MA

Vigeant’s Auto Sales  
(978) 453-8863  
223 Tanner St, Lowell, MA

Howe’s Auto Sales  
(978) 452-0400  
297 Tanner St, Lowell, M

**MASSACHUSETTS PUBLIC EDUCATION FOR STUDENTS K-12**

- For International Students & Scholars with children the state of Massachusetts does provide free public education
- According to where you live your child will be placed in the appropriate school
- Upon your arrival you should plan to visit the Family Resource Center in your town to discuss your child’s education
  - Lowell Massachusetts Family Resource Center  
    *Mr. John Descoteaux, Coordinator*
    Family Resource Center  
    Lowell Public Schools  
    Henry J. Mroz Central Administration Office  
    Edith Nourse Rogers School
Be sure to bring your child, their birth certificate, immunization record, and proof of address is Lowell, MA (utility bill, rent bill, etc.)
- If there is no proof of address you must collect a letter from the City Hall with the homeowner or resident to prove that you reside at the address
- If you do not live in the town of Lowell you will need to contact the Family Resource Center in your own town which can be found at http://www.doe.mass.edu/

- For all information on Lowell Public Schools visit http://www.lowell.k12.ma.us/

The Massachusetts Comprehensive Assessment System Test – MCAS
- All students from 3rd Grade and up are required to take the MCAS Test
- Information on the MCAS Test can be found at http://www.doe.mass.edu/mcas/

Taking the Massachusetts English Proficiency Assessment – MEPA
- Before your child enters Lowell Public Schools they will be assessed to determine whether or not they are exempt from the MEPA Test
- For more information on the MEPA Test visit http://www.doe.mass.edu/mcas/mepa/default.html

212(e) TWO-YEAR HOME RESIDENCE REQUIREMENT

Exchange Visitors and their dependents may be subject to the Two-Year Home Residence Requirement. This requirement is different from the 12-month and 24-month bars mentioned below. It is very important to read and understand section 1(a) on the second page of the enclosed Form DS-2019.

The 212(e) requirement is normally associated with government funding (your country’s or U.S. government funding) and/or the skills list. To see if your country and skill results in this requirement, please check the skills list at:

If you are subject to 212(e), it does not mean that you cannot return to the U.S. for two years in any nonimmigrant status, (for example, in student or tourist status). However, it does mean that you cannot change status in the U.S. or obtain a work visa (H-1B), permanent residency (green card) or an intra-company transferee visa (L-1A/B) unless this requirement is waived or until it is met. For more in-depth information on the Two-Year Home Residence Requirement, please see the ISSS website.

The Consular Officer may indicate this requirement on your visa and/or DS2019 and a U.S. CBP officer may indicate it on your I-94 card when you enter the United States; however, the Department of State Exchange Visitor Program has the final determination concerning this requirement.

**REPEAT PARTICIPATION BARS**

**12-MONTH BAR**

USCIS regulation 22 CFR 62.20(d)(ii) established a “12-month bar” on beginning a new J-1 program as a Research Scholar or Professor for those persons who spent the previous year in the U.S. in any J status (J-1 or J-2). The bar does not apply to transfers from one institution to another, to persons who were Short-Term Scholars or to persons whose J program lasted less than six months.

**24-MONTH BAR**

USCIS regulation 22 CFR 62.20(i)(2) established a “24-month bar” on repeat participation as a Research Scholar or Professor for those persons were present in the United States in J-1 Research Scholar or Professor Category on or after Nov. 17, 2006. The bar does not apply to transfers from one institution to another.

*Please note that these bars only prevent new programs for Research Scholars and Professors who have previously held J status. They do not prevent someone who has held J status from beginning a new program as a J-1 Student or a Short-Term Scholar. Once the applicable 12-month or 24-month time period has lapsed, exchange visitors are again eligible to begin a program in any J category.*
EMPLOYMENT IN THE J-1 SCHOLAR/PROFESSOR CATEGORY

The purpose of the Exchange Visitor Program is “to increase mutual understanding between the people of the U.S. and the people of other countries by means of education and cultural exchanges.” Some Exchange Visitors are employed at UMass Lowell, but the primary activity is to gain, contribute, impart and share specialized skills.

While the visitor may be employed at UMass Lowell, employment is secondary to the purpose of the exchange visitor’s admittance to the US. The J-1 visa is not an employment visa.

Therefore, options for employment outside the host institution are limited. These are classified as occasional lectures or short-term consultations, and are not to be considered employment. The term “occasional” embodies the concept of a single event rather than an ongoing activity.

The criteria for an occasional lecture or short-term consultation is that it must be directly related to the objectives of your program, must be incidental to your primary program activities, and must not delay the completion date of your program at UMass Lowell.

Because you may not be classified as an employee, any wages or remuneration you receive will require you to act as [and be paid as] an independent contractor.

J-1 PROGRAM AND KEY DEFINITIONS

The following information is provided by the U.S. Department of State. We include it in this guide according to the Department of State’s requirements for J-1 Program Sponsors.

The U.S. Department of State administers the Mutual Educational and Cultural Exchange Act of 1961, as amended. The Act promotes mutual understanding between the people of the United States and other countries by means of educational and cultural exchange. The Exchange Visitor Program provides foreign nationals with opportunities to participate in exchange programs in the United States and then return home to share their experiences.

SPONSORS

The U.S. Department of State designates sponsors to administer individual exchange visitor programs. Sponsors are U.S. organizations such as government agencies, academic institutions, educational and cultural organizations, and corporations. They screen and select exchange visitors participating in their programs, provide them with pre-arrival information, an orientation, and monitor their activities. Sponsors offer exchange visitors cross-cultural
activities that will expose them to American society, culture, and institutions. Exchange visitors are encouraged to voluntarily participate in activities that provide them with an opportunity to share their language, culture, and history with Americans.

EXCHANGE VISITORS
An exchange visitor is a foreign national selected by a sponsor to participate in an exchange program, and is issued a J-1 visa. An accompanying spouse and any unmarried children under 21 years of age, may apply for J-2 visas, with the permission of your sponsor.

RESPONSIBLE OFFICERS
Sponsors appoint individuals as responsible officers and alternate responsible officers to advise and assist exchange visitors. These officers issue the Certificates of Eligibility (Form DS-2019), and conduct official communications with the Department of State and the Department of Homeland Security (DHS) on your behalf.

RULES AND REGULATIONS
It is important that you understand and abide by the Exchange Visitor Program regulations, U.S. laws and sponsor rules. Regular contact with your scholar advisor will help you keep current of any changes, which may affect your J status.

ACTIVITIES AND PROGRAM PROVISIONS
You will enter the United States in one program category, and will be required to engage in that category and subject/field of activity listed on your form DS-2019. You must comply with the specific program provisions of the regulations relating to your program category.

MAINTENANCE OF STATUS
You are required to have a valid and unexpired Form DS-2019. Sponsors may terminate an exchange visitor’s program for violating U.S. laws, Exchange Visitor Program regulations or the sponsor’s rules governing their particular program.

NOTIFICATION
You must inform your scholar advisor if you change your address or telephone number, or complete or withdraw from your program early. Doing so will assist your sponsor in complying with their notification and reporting requirements to the U.S. Department of State.
INTERNATIONAL FACULTY, RESEARCH SCHOLAR, AND STAFF VISA CATEGORIES

J-1 Exchange Visitor  (The J-1 visa document – Form DS-2019 can be issued for either student or scholar category. You may refer to the “F-1 & J-1 Student Status” section above for requirements pertaining to F-1 and J-1 “student” status.)

- This visa category is NOT intended for permanent positions such as tenure-track.
- J-1 Visiting Scholars can be self-funded (making it feasible for visiting unpaid scholars).
- J-1 scholar must intend to return home (not appropriate for tenure-track or permanent positions)
- All J-1 & their J-2 dependents must maintain health insurance, in particular, repatriation of remains and medical evacuation benefits).
- Dependents of J-1 (J-2 status) are authorized to apply for work authorization upon arrival with ISSO assistance.

H-1B- Specialty Occupation Category

- This visa category is only intended for paid positions of a specialty nature (individual must have a Bachelor’s).
- UMass Lowell must pay prevailing wage for the position as determined by the Department of Labor.
- This is the visa category most used for long-term faculty positions or tenure-track positions.
- The maximum amount of time on H-1B status is six years (with a maximum initial period of three).
- Concurrent employment is permitted; each employer must apply for an H-1B petition.
- Dual intent is allowed (i.e., person can intend to immigrate to US).
- H-4 Dependents are not permitted to apply for work authorization.
- There are significant fees associated with the H-1B Application Process (including the attorney fees), approximately $2,500. Fees must be paid by the employer.
  - It is illegal for employer to charge the H-1B employee for H-1B processing fees.
TN - *Professionals from Canada or Mexico*, part of The North American Free Trade Agreement (NAFTA)

- The TN is only to be used for temporary employment (not appropriate for tenure-track or permanent positions)
- It can be issued indefinitely in three-year increments.
- Dependents (TD visa holders) are not permitted to apply for work authorization.
- There is minimal paperwork. A letter from UMass Lowell’s sponsoring department will usually suffice.

O-1 - *Workers of Extraordinary Ability*

- O-1 category requires considerable documentation and is best reserved for the most highly qualified professors, researchers, and artists with a high level of expertise (i.e., top in their field).
- The level of paperwork required for this category is similar to the permanent residency application.
- O-1 permits concurrent employment, but each employer must apply for a separate petition.
- O-1 can be granted for a maximum initial period of three years, with one-year extensions possible indefinitely.
- Dependents (O-3 visa holders) are not permitted to apply for work authorization.
- The filing fees for an O-1 are typically similar to those for an H-1B, as mentioned above.

I trust that you find this guide helpful in your adjustment to the United States and UMass Lowell. As always, if you have any further questions or concerns, do not hesitate to contact the ISSO.