J-1 Scholar Coordinator Training

Global Education Office

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Scholar Issues: iadvisor@unm.edu

Meeting Agenda

- I. J-Exchange Program Overview
- II. Steps for Inviting a J-1 Scholar
- III. Responsibilities and Obligations
- IV. Scholar Orientation
- V. Activities & Events for Scholars
- VI. Questions ???

Global Education Office

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Physical GEO Open Hours: Monday-Friday, 9:00am-4:00pm (Virtual/Phone 8-9

and 4-5)

Drop-in hours for Scholars: Monday-Friday, 1:00-3:00pm

Appointments:

https://calendly.com/unm-geo/j1scholaradvising

International Scholar Orientation:

https://calendly.com/unm-geo/j-1-scholar-orientation

GEO Scholar Services

GEO provides services to international students and scholars coming to the University of New Mexico (UNM), coordinates opportunities for UNM students to study overseas and offers intensive English language programs to students interested in studying in the U.S.

Scholar-specific services:

- Providing information, training, and support to departments seeking to invite international professors and researchers
- Providing support to departments for the duration of the J-1
 Scholar visit
- Issuing DS-2019 Certificate of Eligibility for J visa application
- Assisting scholars to understand the immigration rules for maintaining legal non-immigrant status while in the United States and for entering and leaving the U.S.
- Identifying campus and community resources
- Providing cultural adjustment and social activities.

What is a J-1 Scholar Coordinator? (What did I get myself into?)

J-1 Scholar Coordinators are designated by their department to handle all inquiries and requests from departmental faculty and staff regarding visiting scholars. The J-1 Scholar Coordinator is responsible for:

- Serving as a liaison between GEO, the department, the scholar, and the inviting faculty member
- Accurately completing and submitting the J1 Scholar request and confirming departmental responsibilities and actions for each new scholar or extension
- Following the steps provided by GEO via email once the DS-2019 is generated. This includes contacting the appropriate unit to create a role in Banner
- Communicating with GEO in advance regarding changes in the visiting scholar's program or any incidents involving the scholar
- Informing GEO of the scholar's arrival and reminding the scholar about the required scholar orientation immediately after arrival at UNM.

J-1 Exchange Program Overview

The Exchange Visitor (J) Program is administered by the Department of State (DOS) to "promote mutual understanding between people of the United States and the people of other countries by means of educational and cultural exchanges."

For more information:

http://j1visa.state.gov/

J-1 Exchange Visitor Program – Categories

UNM is authorized to bring the following J-1 Exchange Visitors:

- Professor
- *Research Scholar
- Short-Term Scholar
- Specialist
- Student (reserved for those who maintain full-time enrollment in academic programs at UNM. J-1 students are typically exchange or government sponsored students)

J-1 Exchange Visitor Program Categories

Professor:

An individual primarily teaching, lecturing, observing, or consulting at post-secondary accredited educational institutions, museums, or libraries. May also conduct research.

J-1 Exchange Visitor Program Categories

Research Scholar:

An individual primarily conducting research, observing, or consulting in connection with a research project at research institutions, corporate research facilities, museums, or libraries. May also teach or lecture.

J-1 Exchange Visitor Program – Categories

Short-Term Scholar:

A professor, research scholar, specialist, or a person with similar education or accomplishments coming to the US on a short-term visit for the purpose of lecturing, observing, consulting, training, or demonstrating special skills at research institutions, museums, libraries, and post-secondary accredited educational institutions. May also engage in collaborative research.

J-1 Exchange Visitor Program – Categories

Specialist:

An individual who is an expert in a field of specialized knowledge or skill coming to the U.S. for observing or demonstrating special skills.

J-1 Visitor Program – Lengths of Stay

Professors, Research Scholars:

5 year maximum program stay

3 week minimum program stay

Short-term scholars:

6 months maximum program stay ONLY (NO option of extending beyond 6 months!!) No minimum program stay

Specialists:

1 year maximum program stay

3 week minimum program stay

J-1 Exchange Visitor Eligibility

<u>Academic credentials</u> - No minimum academic levels are required by DOS but generally at least a bachelor's degree with appropriate experience in the field of endeavor

Must have at least \$2000/month in financial support for the stay at UNM (an additional \$1000/month for a spouse and \$500/month for each child)

J-1 scholars are not permitted to change the major field of their research or teaching assignment while in the same J-1 program

J-1 Exchange Visitor Eligibility

- Must have "sufficient proficiency in the English language, <u>as</u>
 <u>determined by an <u>objective</u> measurement of English language
 <u>proficiency</u>, to participate in his or her program and <u>to function</u>
 <u>on a day-to-day basis</u>"
 </u>
- Objective measurements:
 - Recognized English language test
 - Signed documentation from an academic institution or English language school; or
 - A documented interview conducted by the sponsor either in person or by videoconferencing or by telephone if videoconferencing is not a viable option (should be real assessment)
 - Native English Speaker

J-1 Exchange Visitor Eligibility

- Departments are responsible for ensuring that the scholar has sufficient English to participate in the program
- Sample English Assessments are on our website here:
 http://geo.unm.edu/all handouts/sample english assessment.
 pdf
- If you have concerns or questions, please contact Phillip

- J1 Scholars are required to have health insurance for themselves and their dependents for their entire stay in the US
- Schools are supposed to inform scholars of the Affordable Care Act (ACA) requirements
- Minimum J1 insurance requirements provide LESS coverage than the ACA mandates
- UNM insurance covers these minimums

MINIMUM J1/J-2 INSURANCE REQUIREMENTS

- Minimum coverage of \$100,000 per accident/illness
- \$25,000 for repatriation of remains
- \$50,000 for medical evacuation
- No more than \$500 deductible
- High Rating (A- Standard and Poors)

- Scholars may elect any health insurance provider that meets the legal criteria for the J visa insurance requirements
- Scholars who are paid by the dept. and have enrolled in one of the employee insurance plans should go to Lobo Care or outside provider and not SHAC
- These plans currently meet this J visa criteria:
 ISO International Student Insurance
 International Student Insurance
 International Student Protection
- More information is on our website here:
 https://isss.unm.edu/scholars/health-care-and-insurance/health-insurance.html

If the Department plans to pay for the unpaid scholar's health insurance please indicate this in the appropriate section of the J1 Scholar Request Form.

Health Insurance Information

The department must establish who will defray the cost of federally mandated health and accident insurance for the scholar and dependents with the following coverage: at least \$100,000 per accident or illness; repatriation of remains in the amount of \$25,000; expenses associated with the medical evacuation of the exchange visitor to his or her home country in the amount of \$50,000; and a deductible not to exceed \$500 per accident or illness.

The department will pay the cost of health and accident insurance:

Yes/No

Rules & Regulations

Bar on tenure track appointments

- J-1 Research Scholar/Professor cannot hold a tenure track position unless they temporarily occupy it as a visiting professor in a position held by a tenured professor on sabbatical
- Specialist cannot fill a permanent or long-term position of employment

12-month bar for J-1 Research Scholars/Professors

A potential visiting scholar is not eligible to begin as a new J-1 Research Scholar/Professor if he or she was physically present in any J status (including J-2 status) for all or part of the 12-month period immediately preceding the date of the program commencement.

There are three exceptions:

- 1) J-1 Exchange Visitor transfer to a new program sponsor;
- Presence in J status for less than 6 months;
- Presence in J status as a Short-Term Scholar.

2 Year (24 month) Bar on Repeat Participation for J-1 Research Scholars/Professors

J-1 Scholars/Professors are eligible for a <u>five year maximum</u> period of participation. Once the scholar has completed his/her program participation and the J record is ended, the scholar will not be permitted to return to the U.S. in the J-1 Research Scholar/Professor category for 2 years (even if they did not use all of the five years during their stay)

212 (e) Home Residency Requirement

Certain J-1 Scholars are subject to a two year home country physical presence requirement. Scholars can be subject to this requirement if:

- Financial support was provided in whole or part by the US government or their home country government, or;
- Their occupation is on the "skills list" for their home country

J-1 Scholars who are subject to the home residency requirement are:

- Prevented from changing to any other type of visa from within the U.S.
- Required to return to their home country for two years before they would be permitted to <u>enter</u> the US with an H (work visa) or L visa, or as a permanent resident.

J-2 Dependents

• Scholars may decide to bring their spouse and/or children with them during their exchange visit to UNM. The J1 Scholar Request Form has a section which requests dependent information from the scholar. The scholar must show proof of financial support for an additional \$1000 per month for a spouse and \$500 per month for each child. If there are dependents, GEO will produce a DS-2019 for each of the dependents at the time the scholar DS-2019 is requested.

 Scholars will have to show proof of marriage at the visa interview (partners are not eligible for J-2)

J-2 Dependents

The following applies to J-2 Dependents:

- Only a spouse and unmarried children under 21 years of age of the J-1 exchange visitor are eligible for J-2 dependent status.
- J-2 dependents are permitted to stay as long as the J-1 maintains legal status; J-2 children must be under 21
- J-2 dependents are permitted to apply for work authorization from USCIS and can work only after obtaining the employment authorization document (EAD) from USCIS
- J-2 dependents are permitted to study (but encouraged to apply for a student visa at the post-secondary level)
- DOS has stated that J-2 dependents of Research Scholars are subject to the 2 year bar on repeat participation. They are also subject to the 12-month bar after previous participation in a J program for more than 6 months.

Which J-1 Category is the Most Appropriate?

- Consider the required minimum and maximum program stay for each category
- Consider the primary activity at UNM (teaching, conducting research, workshops)
- Consider the Scholar's past and future long-term plans in regards to another J-1 program in the US or another program at UNM
- If a scholar has been in the U.S. in any J status in the last 2 years, go through the rules above and discuss the issue with an international advisor at GEO
- Remember that J-2 dependents are also subject to the same bars on participation

Remember! You can always contact GEO if you have questions!

FILLING OUT THE J-1 SCHOLAR REQUEST FORM

What is a DS-2019?

- The DS-2019 or "Certificate of Eligibility" is the document which a scholar must present to the US Embassy or Consulate abroad to obtain a visa and which the scholar must present to immigration officials to enter the U.S. each time s/he travels abroad and returns.
- For most J-1 Scholars, the DS-2019 is issued by the University through GEO. GEO uses the Student and Exchange Visitor Information System (SEVIS) to create the DS-2019 (this is an official government document that is not supposed to be emailed).
- Fulbright scholars come with DS-2019s issued by outside agencies, but we still ask departments to complete a J-1 Scholar Request form so a Banner record can be created (no charge).

What is the DS-2019?



U.S. Department of State

CERTIFICATE OF ELIGIBILITY FOR EXCHANGE VISITOR(J-1) STATUS

OMB APPROVAL NO.1405-0119
EXPIRES: 02-28-2005
ESTIMATED BURDEN TIME: 45 min
*Sec Páge 2

1. Family Name:	First Name:	Middle Name:		Gender: N0000	
Date of Birth(mm-dd-yyyy): City of E		Citizenship Country C	ode: Citizenship Country: CZECH REPUBLIC	J-1	
Legal Permanent Residence Country Code: Leg-	al Permanent Residence Country: REPUBLIC	Position Code: Position: 213 UNIVERSITY	TEACHING STAFF IN	CLUDING	1
U.S. Address: 1 University of New Albuquerque, NM 87:			RESEARCHERS		
2. Program Sponsor: University of New Mexico			Exchange Visitor Program P-1-0185		
Participating Program Official Description: PROFESSOR; RESEARCH SCHOLA STUDENT DOCTORATE; STUDENT			OCIATE; STUDENT BAC	HELORS;	
STUDENT DOCTORATE; STUDENT	MASIERS; SIUDERI NON-	-DEGREE			Ш
Purpose of this form: Amend previous	form: program date(s)	amended			
3. Form Covers Period: From (mm-dd-yyyy): 07-02-2003	4. Exchange Visitor Categor RESEARCH SCHOOL				П
To (mm-dd-yyyy): 07-01-2006		Subject/Field Code Description: Pathology/Pathologist Ass	istant (NEW)		
5. During the period covered by this form, the total		is to be provided to the exchange visitor by:			П
Current Program Sponsor funds : \$3			**· ****.		Ш
				a	П
		4.7	•		П
]

What is the DS-2019?

DS-2019 (formerly LAP-66)

10-2001

6. U.S. DEPARTMENT OF STATE / INS USE OR CERTIFICATION BY RESPONSIBILE OF THIS	7. Linda Melville		Responsible Officer	
FORM TO BEEN PROPINED TO THE US BEPARTMENT OF STATE (INCLUDE DETE). ADMITTED	Name of Official Preparing Form International Programs & Studies		Title	
ALLC O A ARRA	2111 Mesa Vista Hall		505-277-4032	
AUG 0 9 2003	Albuquezque of Mentital difficer or Attendite Responsible Officer		Telephone Number	
T-1		•	06-25-2003	
CLASS 10	Signature of Responsible Officer or Alternate Responsible Officer			
			Date (mm-dd-yyyy)	
 Statement of Responsible Officer for Releasing Sponsor (FOR TRANSFER OF L Effective date(mm-dd-yyyy): , Transfer of this ex to the program specified in item 2 is necessary or highly desirable and is in conforming. 	change visitor from program number	sponsored by ange Act of 1961, as amended.	×	
Signature of Responsible Officer or Alternate Responsible Officer	Date(mm-dd-yyyy) of Signature			
2. Subject to two-year residence requirement based on:	ICER REGARDING SECTION 212(e) OF THE (see item 1(a) of page 2). ALL USAID PARTICIPANTS G-2-0263 AND ALL ALIEN HISICIANS SPONSORED BY P-3-4510 ARE SUBJECT TO THE TWO-YEAR HOME RESIDENCE REQUIREMENT)	*EXCEPT: Maximum vali Scholars and four months for the control of	TION BY RESPONSIBLE OFFIC n validation period is one year*) dation period is up to six months for Short- or Camp Counselors and Summer Travel/W good standing at the present time Date (mm-dd-yyyy) usible Officer or Alternate Responsible Offi good standing at the present time	
Name Office of the Control of the Co	- Title Date (mm-dd-yyyy)		Date (mm-dd-yyyy)	
Signature of Consular or Immigration Officer THE U. S. DEPARTMENT OF STATE RESERVES THE RIGHT TO M.		Signature of Respons	ible Officer or Alternate Responsible Office	
	ith the statement on item 2 on page 2 of this document.			
EXCHANGE VISITOR CERTIFICATION: I have read and agree wi				
EXCHANGE VISITOR CERTIFICATION: I have read and agree wi			07-01-2003	

Scholar Application Link:

https://emforms.unm.edu/obformsapp/UnityForm.aspx?d1=AWQDt35Hk6xWAtcKb% 2bDqK1xftdoB5uNJrCcKEER2bIv44AT0P6iPB8hDYQwbZVK2fMrINJLd4fPhCquQ759 JM7U2f8jVTbMSJ9ZPIinnMkW12fVX707Vb4jQfGmmgxLsN3koHo2NGsI2HyjfEJwYe XYYy5LZKRt1rH7xnvcCgbhBpy2rekRcyuclehr2b018J33AiKN4YUhpoLUohykWbOvyB 7KXn7h2W6N3XoXSlf2SwgJfJ

Filling out the J-1 Scholar Request

Remember to verify scholar program details:

- Confirm that the chair knows about the scholar's appointment
- Confirm work location at UNM and work space
- Confirm appointment type (post-doc, unpaid Visiting Colleague, research staff, etc.) and type of work
- Confirm that English was assessed
- Confirm amounts to be paid to the scholar
- Confirm who will pay health insurance
- Confirm prospective appointment dates
- Confirm scholar email so application link goes to the correct email address.

What is SEVIS?

SEVIS is the <u>Student Exchange Visitor Information System</u>, a web-based system for monitoring and tracking international students and scholars. In order to continue inviting international students and scholars to UNM, GEO is required to follow the regulations and report certain information to DHS.

GEO is required to report the following information:

- ✓ Program Start
- ✓ Scholar Arrival and failure to arrive
- ✓ Change of Address
- ✓ Change in Site of Activity
- ✓ Absence outside of the U.S. for extended time
- ✓ Ending program prior to the end date on the DS-2019
- √ Transfer to another institution
- ✓ Extension of DS-2019 ("Program Extension")
- √ Failure to maintain legal exchange visitor status
- ✓ Any type of incidental employment/engagements/honoraria outside of UNM

SEVIS: Regulatory Requirements

- GEO must notify the Department of State in writing when the exchange visitor has withdrawn from or completed a program thirty (30) or more days prior to the ending date on his or her Form DS-2019. See, 22 C.F.R. § 62.13(c)(1).
- GEO must validate a scholar's program within 30 days of the program start date as recorded on his or her form DS-2019. That means, if a scholar experiences a delay obtaining a visa abroad, the department must notify GEO to see if it will be necessary to defer the program start date on the DS-2019.
- Any plans for the scholar to leave the U.S. for more than 60 days to continue his or her program activities abroad, must be reported to and authorized by GEO in ADVANCE.
- Any adverse situation that the scholar experiences: loss of passport, arrest, victim of a crime, accident, etc.

Banner Data Entry

- After the department submits a J-1 Scholar Request and the DS-2019
 has been issued, GEO will provide the Banner ID number to the
 Department. However, the scholar will NOT have a role UNTIL the
 department contacts the appropriate "employment" unit.
- GEO will email the department with instructions on contacting the appropriate Employment Unit to assign a Banner role and enter demographic and other information into Banner.

Main Campus Faculty Contracts
North Campus Faculty Contracts

This should be done <u>as soon as possible</u> after receiving the email from GEO. Note that the employment unit may not be able to enter paid scholars until their arrival at UNM.

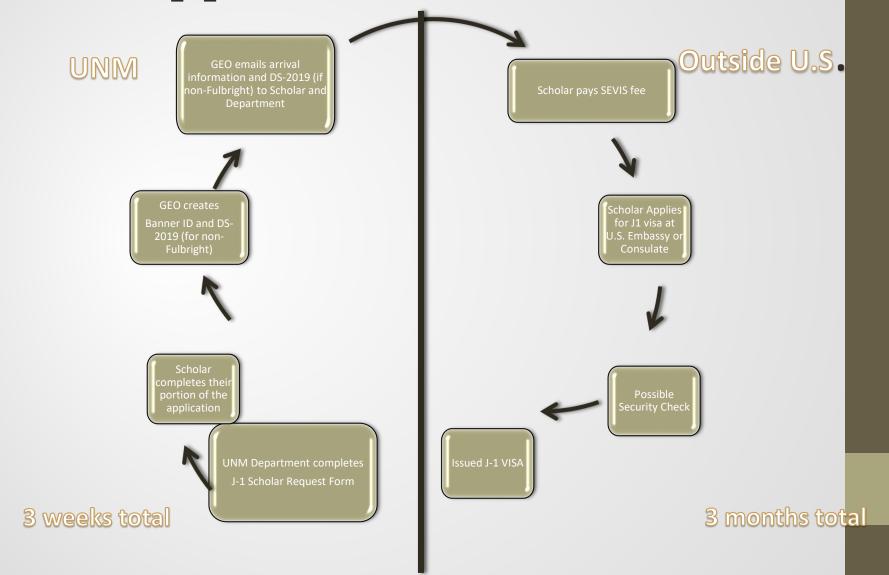
Types of Scholar Roles in Banner

- Scholars hired in a paid appointment/role are "Employees" in Banner and receive all privileges of UNM employees.
- Unpaid Scholars with Letters of Academic Title (LAT) are listed as "Affiliates" with most campus privileges.
- Unpaid scholars without a LAT (visiting colleagues/HSC Visiting Scholars) are listed as an "Affiliate" with <u>limited</u> campus privileges.



AFTER THE SCHOLAR RECEIVES THE DS-2019

Visa Application Process



Visa Application

- OIndividuals entering as J-1 Scholars must pay the SEVIS fee and have a valid J-1 entry visa (except Canadians).
- OThe entry visa is a sticker with photograph on a page of the scholar's passport that permits entry to the US.
- OThe scholar must present a SEVIS fee receipt and a valid SEVIS form DS-2019 to the US Consular officer to obtain the entry visa.

Visa Application

Documents Scholar Brings to the Visa Interview:

- OForm DS-2019
- Passport
- **O**Photos
- OVisa Application Fee or Receipt
- **OSEVIS Fee Receipt**
- Supporting documents regarding the program

Scholars should contact the embassy or consulate to verify additional documentation which may be required.

SEVIS Fee I-901

- Currently \$220
- Scholars have to know the SEVIS number located on the DS-2019 before the fee can be paid
- Scholars must have proof of payment of I-901 Receipt, prior to J-1 Visa Appointment at US Consulate
- Scholars are given visa application instructions in GEO Welcome Letter
- UNM departments can choose to pay this fee for the scholar.

Visa Application Process

- OBear in mind that background checks, particularly for scholars from certain countries, can cause visa delays.
- OPlease contact GEO if the scholar's program start date needs to be deferred due to visa processing delays.



At the Port of Entry: Customs & Border Protection

- The Scholar presents their passport, visa, and DS-2019 (sometimes in a sealed envelope) to the CBP official
- The official grants entry to the U.S. in a specific status. If the scholar does not enter in the correct status s/he cannot begin paid employment and must seek a correction
- Status appears on an electronic entry record called an I-94 after their arrival in the US
- Immigration regulations prohibit exchange visitors and dependents from arriving more than 30 days prior to their program start date.

Special Issues for J-1 Scholars: Out of Country Record

"Out of Country Functionality" allows a J-1 Research Scholar or Professor to participate in his/her exchange program for a particular period of time outside of the U.S., provided the program activities will be continued in the out of country location.

The J-1 Scholar must seek an "Out of Country" Authorization from GEO when s/he will be out of the country for 60 days but less than one year in agreement with the department to pursue the original objectives of the exchange program.

Special Issues for J-1 Scholars: Non-UNM Paid Engagements

Scholars may participate in occasional lectures or short-term consultations outside of UNM but these activities must:

- ✓ Be directly related to the objectives of the J-1 Scholar's Program
- ✓ Be incidental to the scholar's primary program activities
- ✓ Not delay the completion date of the EV's program
- ✓ The scholar must obtain WRITTEN authorization from the international advisor in ADVANCE of the activity.
- ✓ The scholar must present GEO with a letter from the offering institution with the conditions of the offer.
- ✓ The scholar must present GEO with a letter from the department head or direct supervisor recommending such activity and explaining how it would enhance the Scholar's program.

Responsibilities of J-1 Scholars

Scholars Must ALWAYS:

- Conduct research/teaching only at the institution at which they are authorized to work by the Department of State (DOS)
- Provide GEO and USCIS with an updated local address within 10 days of any change
- Maintain a valid DS-2019 form, apply for an extension of stay at least one month before the document expires; see an advisor for a new DS-2019 if any information changes
- Inform GEO if any of the following occur: a change in site of activity, absence from the U.S. for more than 60 days, leave program prior to the end date on the DS-2019.
- Maintain a valid passport throughout their stay in the US
- Complete necessary "immigration transfer procedures" when changing from one institution to another in the US (the scholar must meet with the international advisor before s/he can transfer to a new institution, transfer must be in the same category and field)

Scholars have a 30 day "grace period" following the end of their program. During that time they have some or all of the following options available:

- a. Leave the US
- b. Get a new DS-2019 form for a new institution and complete transfer procedures
- c. Apply for a change to another immigration status with the USCIS

Responsibilities of J-1 Scholars (cont...)

Scholars Must NEVER:

- WORK for an institution other than the one listed on their DS-2019 unless they have received the required written authorization from the international advisor in advance (consult the international advisor for details)
- Terminate their program early or take a leave of absence without informing GEO; <u>scholars who terminate their program</u> <u>before the end date on their DS-2019 are supposed to leave</u> <u>immediately</u>

Responsibilities of J-1 Scholars (Cont...)

Additional Legal Requirements:

- J1 scholars are required by section 514.12 of the exchange visitor regulations to have health insurance coverage for themselves and all J-2 dependents that includes minimum coverage of \$100,000 per accident/illness, \$25,000 for repatriation of remains and \$50,000 for medical evacuation. They need to check their insurance coverage carefully to be sure it meets these requirements
- All international scholars are required to complete and submit US tax forms to the federal government every year regardless of whether or not they earned any money in the US (tax workshops and advising are available through our VITA site in GEO)

Key Departmental Post-Arrival Responsibilities

- Remind scholar re mandatory scholar orientation
- Reporting changes in program dates for incoming scholars (GEO must validate scholar's program within 30 days of scholar's program start date or amend start date in SEVIS)
- Reporting scholars who leave their program (includes program completion, termination or withdrawal)
- Maintaining communication between GEO, the scholar, and the department
- Filing timely extensions with GEO for scholars who need their DS-2019 extended
- Build sufficient time (at least three months) for incoming scholars to arrive at UNM

J-1 SCHOLAR ORIENTATIONS

HTTPS://CALENDLY.COM/UNM-GEO/J-1-SCHOLAR-ORIENTATION

VIRTUAL UNLESS REQUESTED IN-PERSON

J-1 Scholar Orientation

During J-1 Scholar Orientation GEO reviews the following in detail:

- Responsibilities for maintaining legal J-1 status
- Steps for getting settled at UNM and in Albuquerque (housing, transportation, bank accounts, Lobo Card, UNM email, etc.)
- Applying for a Social Security Number
- Applying for a NM Driver's License/State ID
- Health Insurance Options/Issues

GEO must also make copies of important immigration documents. Please remind scholars to have access to these documents at the orientation.

Activities and Events for Scholars

- International Social Events
- Trips
- Workshops



Checklist for J-1 Scholar Coordinators – Pre-Arrival

- Submit J-1 Scholar Request form
- Remind Scholar to complete their portion
- Submit the appropriate forms to Office of Academic personnel or other hiring unit so scholar has a role assigned upon arrival
- ☐ Report any changes in scholar's program start date to GEO
- □ Remind Scholar to schedule mandatory GEO orientation for J-1 Scholars

Checklist for J-1 Scholar Coordinators - Ongoing

■ Report changes in scholar's program or address to GEO within 10 days

Report when scholar leaves program/country (includes program completion, withdrawal, termination, intent to transfer, out of country record)

Submit DS-2019 extension request at least one month before current DS-2019 document expires

☐ Respond to GEO inquiries regarding current Scholars

Report any changes in designation of J-1 scholar coordinator to GEO

Thank you for all of your work to support our International Scholars!



Please do not hesitate to contact us!