THE PENNSYLVANIA STATE UNIVERSITY
VISITING SCHOLAR HOST GUIDELINES

These Host Guidelines are designed to assist individuals – both Individual Hosts and Administrative Hosts - interested in hosting a Visiting Scholar, in compliance with University Policy AC01, Visiting Scholars, and answer some frequently asked questions.

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OVERVIEW

Who is a Visiting Scholar?

A Visiting Scholar must be visiting from, and affiliated with, an outside (domestic or foreign) university, institution, or business.

Visiting Scholars are granted access to University facilities to provide instruction that is supervised by appropriate University Personnel, to conduct collaborative research, or to observe University instruction, administration, or research. Visiting Scholars do not receive financial support from the University for their effort beyond travel and/or expense reimbursement and/or an honorarium, where appropriate and applicable.

The designation of Visiting Scholar is appropriate for faculty from other academic institutions during a period of sabbatical at their home institution, or qualified personnel from industry, government, or other organizations who wish to visit the University.

The definition of Visiting Scholar also includes visitors with the designation of “Visiting Researcher” or “Visiting Scientist.”

Are Visiting Scholars employees of the University?

No. Visiting Scholars are not employees of the University.

Who else would not qualify as a Visiting Scholar?

The Visiting Scholar designation is not appropriate for those who should be classified as Postdoctoral Scholars / Fellows (University Policy HR68 Postdoctoral Appointments). The Visiting Scholar designation also does not apply to University students (whether registered as a degree or non-degree student at Penn State), employees, independent contractors, or University retirees with Emeritus Status (University Policy AC25 Emeritus Status). Visiting Scholars also are not undergraduate students from other academic institutions who otherwise might be considered interns.

The designation of Visiting Scholar excludes individuals who are merely visiting common areas at Penn State. The Visiting Scholar designation also does not apply to University invited speakers / guest lecturers who provide a speech / guest lecture that is open to the University community or public or to a University class.

The Visiting Scholar designation also does not apply to any individuals visiting the University pursuant to a properly executed and active External User Agreement or Academic Research Services Order (ARSO). If, however, an Individual Host or Administrative Host seeks to designate any individual visiting the University pursuant to an External User Agreement or ARSO a Visiting Scholar, then the Individual and Administrative Host must follow University Policy AC01 for the Visiting Scholar designation.

The Visiting Scholar designation does not apply to members of University recognized Advisory Boards whose visit to the University relates to their service on that Advisory Board.
Finally, employees of industry, academia, or the government visiting the University pursuant to a sponsored research agreement between the third-party employer and the University whose visit is specifically referenced and governed by said research agreement are not Visiting Scholars under the Policy.

**I understand that the Visiting Scholar designation excludes individuals who are merely visiting common areas at Penn State. What constitutes a “common area” for purposes of the Visiting Scholar Policy?**

For purposes of the Visiting Scholar Policy, a common area refers to any outdoor area available for public use that anyone may use (i.e., lawns, sidewalks, and unrestricted outdoor areas). A common area also refers to any University publicly available interior building spaces that anyone may access during the building’s normal hours of operation. If the person you are inviting to campus only is accessing such common areas during their visit to the University, then the Visiting Scholar designation is not appropriate or applicable.

**I understand that the Visiting Scholar designation also excludes undergraduate students from other academic institutions who otherwise might be considered interns. What situations / scenarios does that contemplate?**

Undergraduate students from other academic institutions may sometimes work or volunteer at the University as “interns.” In this capacity, such undergraduate students are engaging in efforts on behalf of the University at the direction of, and under the supervision of, a University employee. These interns -- who are still undergraduate students at other academic institutions -- are at the University to gain practical training and experience, which may include some observation and research. Their work complements and does not displace the work of University employees and most of the time, these undergraduate students participate in the internship in order to satisfy academic requirements of their home institutions. Sometimes this work is paid and in limited circumstances, it may be unpaid.

Example: Undergraduate student from Lock Haven University majoring in athletic training needs a finite number of hours of clinical observation for their degree can intern with the Intercollegiate Athletics Department and are not a visiting scholar under this Policy.

**I am inviting a graduate student from another academic institution to Penn State. Is she a Visiting Scholar?**

If a graduate student from another academic institution is invited to Penn State and does not want – or need – to participate in graduate education and training in any way, then the Visiting Scholar Policy applies to that visit to the University and that graduate student from another academic institution must participate in the Visiting Scholar process.

However, many graduate students from other academic institutions enroll in Penn State’s Graduate School as non-degree students and participate in graduate education at some level, whether auditing or taking a course for credit, or arranging for formal internship credits to reflect
their participation in research or other activities through 595/895 courses. Students appointed to an assistantship, who take courses for credit or audit, are enrolled in a special status – "Provisional – No Time Limit." These mechanisms allow graduate students visiting from other academic institutions to get formal credit for their time on campus and provide the Graduate School with the opportunity to track and support these visiting students, as appropriate. These visiting graduate students do not qualify as Visiting Scholars under the Visiting Scholar policy and are expressly excluded under subsection (c) of the “Exclusions” [that is, excluding “University students (whether registered as a degree or non-degree student at Penn State).”]

To the extent you have any questions about the degree status of any particular visiting graduate student, please contact the Associate Director of Graduate School Enrollment Services at (814) 865-1795.

Pursuant to subpart (k) of the “Exclusions” section in the Visiting Scholar Policy, an employee of industry, academia, or the government visiting the University pursuant to a sponsored research agreement between the third-party employer and the University whose visit is specifically referenced and governed by said sponsored research agreement is specifically excluded from the Visiting Scholar Policy. My visitor will be visiting the University in conjunction with a Penn State sponsored research agreement, but he is not specifically referenced and governed by the contract. What should I do?

While subpart (k) of the “Exclusions” in the Visiting Scholar Policy explicitly excludes those individuals visiting the University who are specially referenced and governed by a sponsored research agreement between the University and the third-party employer, the University recognizes that oftentimes, individuals from industry, academia, or the government visit the University pursuant to a sponsored research agreement but are not specifically referenced and governed by the sponsored research agreement. Rather, these individuals simply visit the University and access University facilities as part of the larger project.

In those instances, the University requires that you do one of the following: (1) work with the Office of Sponsored Programs (OSP) to amend the existing sponsored research agreement to specifically reference and govern the additional visitors from the company, academia, or industry who will be visiting the University; or (2) initiate the Visiting Scholar process to designate the individual a Visiting Scholar pursuant to the Visiting Scholar policy.

Why must a Visiting Scholar be “supervised by appropriate University Personnel” if providing instruction in a University facility during a visit?

We certainly welcome and encourage Visiting Scholars to share their knowledge and expertise with University students in the classroom. It is entirely appropriate for a Visiting Scholar to provide an occasional lecture or even teach a limited, distinct portion of a semester long class. But, since Visiting Scholars are not University employees, the Visiting Scholar cannot take the place of the University Personnel assigned to teach a particular course. Moreover, the appropriate University Personnel (that is, any College, Department, Institute, Unit, and/or any paid faculty, investigator, employees, staff, and/or researcher) must be aware of – and provide
general supervision for—any instruction the Visiting Scholar may provide in University facilities to ensure compliance with these general principles.

If you are interested in asking a Visiting Scholar to teach an entire course at Penn State, then that individual should not be designated a Visiting Scholar. Rather, you should go through the standard Penn State HR process to hire that person as a Penn State employee to teach that course.

**Who is an Individual Host?**

An Individual Host is any University employee who hosts a Visiting Scholar pursuant to the Visiting Scholar policy.

In most cases, the Individual Host will be the Penn State professor who—along with the Administrative Host—invites a Visiting Scholar to Penn State.

**Who is an Administrative Host?**

The Administrative Host is the designated University representative within a College, Department, Institute, or at a Commonwealth Campus where the Visiting Scholar will be present. The Administrative Host is an administrator who can extend an invitation to—and provide guidance and supervision for—the Visiting Scholar.

Examples of appropriate Administrative Hosts include a College Dean, Research Dean, Department Head, Chancellor, or Institute Director.

**Can the Individual Host and the Administrative Host be the same person?**

No. The Individual Host and the Administrative Host must be different Penn State employees.
PERMITTED REIMBURSEMENTS (INCLUDING HONORARIUM)

How do I determine the amount of support and/or permitted reimbursements for the Visiting Scholar?

Since Visiting Scholars are not University employees, we may not provide compensation, employee benefits (including health insurance or discounts), or other financial support available to employees. However, the College, Department, Institute, Unit, or Commonwealth Campus may decide it is appropriate to reimburse for travel and/or University business expenses and/or to provide an honorarium, where appropriate and applicable. University payments should be made as reimbursements to the Visiting Scholar, as opposed to direct payments for items, including, but not limited to, housing.

Reimbursed expenses for Visiting Scholars may include travel to and from the University at the beginning and end of the Visiting Scholar designation, reasonable living expenses (including per diem), and healthcare insurance for international Visiting Scholars only, as required by law. Specifically, the types of support and/or permitted reimbursements available to a Visiting Scholar are as follows:

- **Honoraria:** A honorarium is limited to $1,000, and the frequency of honoraria cannot exceed one every thirty (30) days with a maximum of three payments during any calendar year. This means that total support from honoraria cannot exceed $3,000 in any calendar year. Please note that honoraria are subject to tax and are reported by the University to the IRS if over $600 per year.

- **Expense Reimbursements:** Expense reimbursement should follow established University policies and processes. Reimbursed expenses may include the following: travel to and from the University at the beginning and end of the Visiting Scholar designation, meal and incidental reimbursement capped at – and not to exceed – the prescribed per diem by locality, reasonable living expenses, and healthcare insurance for international Visiting Scholars only, as required by law. Please note that each College, Department, Institute, Unit, or Commonwealth Campus is permitted to cap the amount of permitted reimbursement further, as desired.

- **Cash Advance:** Departments may issue cash advances to visitors upon arrival using the per diem meal amount relating to the time of the Visiting Scholar designation.

Payment of expenses should follow general University policies and processes, including, but not limited to, FN10 (Other Business Expenses and Activities), TR02 (Penn State Travel Policy), and BS14 (Penn State Purchasing Card). To the extent you have any questions about these policies and permitted reimbursements generally, please consult with your financial officer. Your financial officer also can advise you of any internal policies that may have been implemented to cap the amount of reimbursement.
What are the tax implications of this support and/or permitted reimbursements to the Visiting Scholars?

While these Host Guidelines do not provide tax advice, expense reimbursements generally will not be taxable to the Visiting Scholar if the duration of the designation is for no more than one year. If the Visiting Scholar designation is renewed for a longer time, all reimbursable expenses (such as travel and living reimbursements) paid after the date of renewal will be taxable.

Example: Visiting Scholar is invited for a one-year designation beginning on January 1, 2020. On September 1, 2020, the designation is extended for an additional six months until June 30, 2021. Reimbursed expenses paid by the University that were incurred prior to September 1, 2020 will not be subject to tax. However, University reimbursed expenses that occurred on September 1 or later will be taxable. Please contact the appropriate Finance Office for questions relating to permitted reimbursable expenses and tax consequences.

What if cash is needed in advance of the Visiting Scholar incurring the expenses?

A College, Department, Institute, Unit, or Commonwealth Campus may issue advance payments to Visiting Scholars upon arrival using the per diem meal amount relating to the time of the Visiting Scholar designation.

Can I pay – or otherwise compensate - my Visiting Scholar off grant funds I receive?

No.
VISITING SCHOLAR PROCESS AND HOST RESPONSIBILITIES

I want to invite a Visiting Scholar to the University for less than fourteen (14) consecutive days. What do I need to do?

If you want to invite a Visiting Scholar for less than fourteen (14) consecutive days, here is what you need to do:

1. **Hosts** - The Administrative Host and the Individual Host must agree to serve as the hosts of the Visiting Scholar. The Individual Host will notify the Administrative Host of the proposed invitation of a Visiting Scholar prior to the commencement of the visit. For the Individual Host, acceptable “notice” includes sending an e-mail from your Penn State email account to the Administrative Host to request hosting a Visiting Scholar for less than fourteen (14) consecutive days. The Administrative Host must approve the proposed Visiting Scholar and issue a joint invitation with the Individual Host.

2. **Visiting Scholar Request Form** - The Individual or Administrative Host (or their designee) must complete and submit a Visiting Scholar Request Form.

3. **International Visiting Scholars** - We are delighted to welcome talented international Visiting Scholars to Penn State, but please note that those international Visiting Scholars require the following:
   a. **Global Programs** - Visiting Scholars who are present at the University for less than fourteen (14) consecutive days on a J-1 visa sponsored by the University must consult with **Global Programs**.
   b. **Export Review** - Regardless of the duration or purpose of the visit, all international Visiting Scholars are subject to an export review prior to arrival. **University Policy AD89, University Export Compliance Policy**. All proposed international Visiting Scholars covered under the Visiting Scholar Policy who are not processed under established Global Programs processes, such as those not requiring University visa support or sponsorship, should be submitted to the University Export Compliance Office for export review at least thirty (30) days prior to arrival at University facilities using the online **Internal Visiting Scholar Export Review Request Form** available at the **University Export Compliance** website.

4. **Significant Financial Interest Disclosure Form** - Regardless of the duration of the visit, all Visiting Scholars who will be responsible for University research during the visit must submit a **Significant Financial Interest Disclosure** form to the Administrative Host for review by the Conflict of Interest Program. If, however, the proposed Visiting Scholar will not be responsible for University research during the visit, the proposed Visiting Scholar is not required to submit a Significant Financial Interest Disclosure form.

5. **Intellectual Property Agreement** - Regardless of the duration of the visit, the Administrative Host for any proposed Visiting Scholar must ensure that the Visiting Scholar who will be creating intellectual property in University facilities submits the
Intellectual Property Agreement to the Office of Technology Management prior to the commencement of the visit.

6. **Oversight** - The Individual Host provides oversight to the Visiting Scholar during their time here.

7. **Conclusion of Visit** – The Individual Host must ensure that the visit concludes satisfactorily. The Individual Host is responsible for informing the Administrative Host of the Visiting Scholar’s departure from the University; notice of departure can be accomplished by sending an email to the Administrative Host upon completion of the visit less than fourteen (14) consecutive days.
I want to invite a Visiting Scholar to the University for fourteen (14) consecutive days or more. What do I need to do?

If you want to invite a proposed Visiting Scholar to the University for fourteen (14) consecutive days or more, then there are additional steps you must take. These steps include, but are not limited to, receiving University approval, via the Office of the Vice Provost for Faculty Affairs, for the proposed visit. Here are the steps to follow:

1. **Letter of Invitation** – The Individual Host and the Administrative Host must jointly issue a letter of invitation to the proposed Visiting Scholar. All letters of invitation must comply with the Visiting Scholar letter of invitation requirements. A template for the letter of invitation and its required attachments (the Visiting Scholar Agreement and the Significant Financial Interest Disclosure form) can be found here.
   
   a. **Visiting Scholar Agreement** – All Visiting Scholars who will be visiting the University for fourteen (14) consecutive days or more must sign the Visiting Scholar Agreement. Please note that the terms of the University’s Intellectual Property Agreement are included in the Visiting Scholar Agreement; therefore, the Visiting Scholar does not need to complete a separate Intellectual Property Agreement so long as the required Visiting Scholar Agreement for Visiting Scholars at Penn State fourteen (14) consecutive days or more is signed.
   
   b. **Significant Financial Interest Disclosure Form** – All Visiting Scholars who will be responsible for University research during the visit must also submit the Significant Financial Interest Disclosure form to the Administrative Host for review by the Conflict of Interest Program. If, however, the proposed Visiting Scholars will not be responsible for University research during the visit, the proposed Visiting Scholar is not required to submit a Significant Financial Interest Disclosure form.

2. **Visiting Scholar Request Form** – The Individual or Administrative Host (or their designee) must complete a Visiting Scholar Request Form and submit it, along with (i) the letter of invitation; (ii) the proposed Visiting Scholar’s curriculum vitae; and (iii) a signed Visiting Scholar Agreement to the Office of the Vice Provost for Faculty Affairs.

3. **International Visiting Scholars** – We are delighted to welcome talented international Visiting Scholars to Penn State, but please note that those international Visiting Scholars require the following:
   
   a. **Global Programs** – If the proposed Visiting Scholar needs a J-1 visa, the Administrative Host must contact Global Programs and must comply with its processes.
   
   b. **Export Review** – Regardless of the duration or the purpose of the visit, all international Visiting Scholars are subject to an export review prior to arrival. University Policy AD89, University Export Compliance Policy. All proposed international Visiting Scholars covered under the Visiting Scholar Policy who are not processed under established Global Programs processes, such as those not requiring University visa support or sponsorship, should be submitted to the University Export Compliance Office for export review at least thirty (30) days...
prior to arrival at University facilities using the online [International Visiting Scholar Export Review Request Form](#) available at the [University Export Compliance website](#).

4. **Office of the Vice Provost for Faculty Affairs** – Upon review of all applicable documents and consultation with applicable University departments (e.g., Export Compliance Office, the Office for Research Protections), the Office of the Vice Provost for Faculty Affairs will determine final visitor eligibility and will sign the Visiting Scholar Agreement on behalf of the University, assuming, of course, all conditions in the Visiting Scholar Policy are met. The Office of the Vice Provost for Faculty Affairs also will inform the Individual Host and the Administrative Host of the Visiting Scholar’s eligibility.

5. **“Add Contingent Worker” Form** – All Visiting Scholars who will be present at the University for fourteen (14) consecutive days or more must have a profile in Workday. The Individual and/or Administrative Host (or their designee) is responsible for submitting the “Add Contingent Worker” form to HR Shared Services. This form is available under: Manager Tools on the WorkLion Portal.
   a. **Background Check** – All Visiting Scholars who will be present at the University for fourteen (14) consecutive days or more must also successfully complete the University background check before commencing the visit. The background check will be processed by HR Shared Services upon receipt of the “Add Contingent Worker” form.

6. **Oversight** – The Individual Host is responsible for hosting and facilitating the visit and ensuring that the visit concludes satisfactorily.

7. **Administrative Host** – After the University grants the Visiting Scholar designation, the Administrative Host then is responsible for the following during the visit:
   a. **Office Space** – providing space for the Visiting Scholar, if appropriate.
   b. **Orientation** – orienting the Visiting Scholar to applicable University policies and resources.
   c. **Appropriate Use of University Facilities** – ensuring that authority for use of University facilities or access to University facilities is appropriate and issuing the appropriate authorization letters, if applicable.
   d. **Training** – ensuring that the Visiting Scholar receives all required University training (e.g., health and safety for the facilities and equipment, if any, they will use during the visit and/or other mandatory training).
   e. **University Identification Card (ID Card)** – determining whether an ID card is necessary and paying for the ID Card of the Visiting Scholar. Please note that Visiting Scholars whose visit to the University is at least thirty (30) calendar days are eligible for a University Identification Card.
   f. **Penn State Access Account and Email Address** – determining whether a Penn State email address is necessary and covering the costs associated with providing this Penn State email address. Please note that Visiting Scholars whose visit to the University is at least fourteen (14) consecutive days or more are eligible for a Penn State Access Account and email address during their visit. To request a
“Sponsored Access Account,” please visit Identity Services at Penn State (www.identity.psu.edu/authentication-definition/sponsored-access-accounts) This webpage explains the account types, monthly fee, and the process for requesting the account. **IMPORTANT:** The Access Account and email address must be requested directly to Identity Services by the Administrative or Individual Host. HR Shared Services does not process Sponsored Access Account requests.

8. **Conclusion of Visit** – The Individual Host and/or the Administrative Host must ensure that the visit concludes satisfactorily. The Administrative Host also must ensure that the Visiting Scholars returns all issued office or laboratory keys, the University ID card (if one is issued), and all credential upon completion of the visit.
LETTER OF INVITATION

Can I make changes to the letter of invitation template?

Individual and Administrative Hosts certainly are permitted to tailor their jointly issued letters of invitation to each Visiting Scholar and to add language that best reflects the unique characteristics of your College, Department, Institute, Unit, or Commonwealth Campus and the proposed visit. But, all letters of invitation must contain the substantive information already set forth in the letter of invitation template that also captures the letter of invitation requirements.

VISITING SCHOLAR AGREEMENT

As an Individual or Administrative Host, can I sign the Visiting Scholar Agreement on behalf of the University?

No.

Who is authorized to sign the Visiting Scholar Agreement on behalf of the University?

In accordance with the delegation authority granted by the resolution adopted by the University’s Board of Trustees on May 3, 2013, the University has authorized the Vice Provost for Faculty Affairs to sign standard format for Visiting Scholar Agreement on behalf of Penn State.

Can I make changes to the Visiting Scholar Agreement?

As a way of background, the Visiting Scholar Agreement (the “Agreement”) is the University’s standard, pre-approved agreement that all Visiting Scholars visiting the University for fourteen (14) consecutive days or more must sign pursuant to the Visiting Scholar Policy. Neither the Individual Host nor the Administrative Host are permitted to make changes to the Agreement. Changes to the Agreement only can be made in limited and exceptional circumstances. A typical example of such “limited and exceptional circumstances” would include a request of the Visiting Scholar’s Home Institution (i.e., university or college) that may be providing financial support to the Visiting Scholar during the visit to Penn State. The Individual Host and/or the Administrative Host must provide a written justification of the change / changes requested by the Visiting Scholar to the Agreement to the Office for the Vice Provost for Faculty Affairs. Only upon prior review and approval by the Office of the Vice Provost for Faculty Affairs can changes be made to the Agreement.

For Visiting Scholars at the College of Medicine, does anyone else need to sign the Visiting Scholar Agreement on behalf of the University?

Yes. The College of Medicine requires an additional signature from either the Vice President of Finance and Business or the Assistant Vice President of Finance and Business.
SIGNIFICANT FINANCIAL INTEREST DISCLOSURE FORM

Who is required to sign the Significant Financial Interest Disclosure Form?

Regardless of the duration of the visit, any proposed Visiting Scholar who will be responsible for University research during the visit must submit a Significant Financial Interest Disclosure (as outlined in University Policy RP06) to the Administrative Host for review by the Conflict of Interest Program in the Office for Research Protections.

How is research defined?

The definition of research can be found in the definition section of University Policy RP06 (Disclosure and Management of Significant Financial Interests). RP06 states, in relevant part, that research “means systematic investigation, study or experiment designed to develop or contribute to generalizable knowledge. The term encompasses basic and applied research that may or may not be published in an article, book or book chapter and product development (e.g., a diagnostic test or drug).” As used in RP06, the term research includes, but is not limited to, “any such activity for which sponsored funding is available from a federal, state or local government agency, or a public or private entity, through a grant, contract or cooperative agreement (e.g., research grant, career development award, center grant, individual fellowship award, infrastructure award, institutional training grant, program project, research resources award training grant, or outreach award), or gift. As used in [RP06], Research also includes research activities that are not funded or sponsored.”

My Visiting Scholar will not be responsible for University research during her visit to the University. Does she still need to submit the Significant Financial Interest Disclosure Form?

No. If the proposed Visiting Scholar will not be responsible for University research during the visit, the proposed Visiting Scholar is not required to submit a Significant Financial Interest Disclosure form.

I am inviting a Visiting Scholar to Penn State during his sabbatical from another university. During his visit to Penn State, he will be assisting me on a paper that I am working on for publication. If my Visiting Scholar will not otherwise be conducting research at the University beyond collaborating with me on this paper, does he still have to complete the Significant Financial Interest Disclosure Form?

Reporting of research, e.g., writing papers, is part of the definition of research. Therefore, if a Visiting Scholar is responsible for writing a research paper, then he will need to submit a financial disclosure. But, if he is only here to assist a University employee who ultimately is responsible for the paper, then he will not need to submit a financial disclosure. If you are unsure about other specific situations or circumstances, please contact the Conflict of Interest Program at coistantf@psu.edu, or at (814) 865-1775, to discuss whether a disclosure is required.
My Visiting Scholar only will be observing research during her time at Penn State. Is she required to complete the Significant Financial Interest Disclosure Form for merely observing research?

No. Observing research does not constitute “research” for purposes of whether a Visiting Scholar needs to submit the Significant Financial Interest Disclosure. Therefore, a Visiting Scholar merely observing research during her visit to the University is not required to complete the Significant Financial Interest Disclosure form.
DURATION OF VISIT

How long can a Visiting Scholar be hosted?

Visiting Scholar designations are for a maximum period of one year. Upon recommendation of the Administrative Host and approval by the Office of Vice Provost for Faculty Affairs, Visiting Scholar designations may be renewed up to a full second year, although shorter extensions are possible. An extension beyond two years must be approved by the Dean of the College or Institute Director, where applicable, and the Office of Vice Provost for Faculty Affairs and will be granted only for extraordinary and compelling reason.

What process do I need to follow to extend the Visiting Scholar’s visit longer than one year?

Upon recommendation of the Administrative Host and approval by the Office of the Vice Provost for Faculty Affairs, Visiting Scholar designations may be renewed up to a full second year, although shorter extensions are possible. To extend the Visiting Scholar’s visit, please have the Visiting Scholar complete and submit a new Visiting Scholar Agreement, reflecting the dates of the extension and submit to the Office of the Vice Provost for Faculty Affairs via the online system. Please also consult with Global Programs if you are hosting an international Visiting Scholar requiring an extension of the J-1 visa.

What are the “extraordinary and compelling reasons” that are required to grant a Visiting Scholar an extension of the visit beyond two years?

An extension for a Visiting Scholar’s visit beyond two years must be approved by the Dean of the College or Institute Director, where applicable, and the Office of the Vice Provost for Faculty Affairs. An example of an “extraordinary and compelling reason” when considering whether to extend a visit beyond two years includes, but is not limited to, the Visiting Scholar’s collaboration on a multi-year project with the Individual Host or appropriate University Personnel.

INTERNATIONAL VISITING SCHOLARS

Is there anything else I need to do for a proposed international Visiting Scholar who requires a J-1 visa?

Yes. In addition to consulting with Global Programs for international Visiting Scholars requiring a J-1 visa, the Individual Host and/or their designee must also still enter the Visiting Scholar into Global Programs’ iStart system to initiate the J-1 visa process with the University, as per current standard practice.
APPLICATION OF POLICY TO CURRENT VISITING SCHOLARS

My Visiting Scholar was here before the University implemented the Visiting Scholar policy. What should I do?

Any renewals to - or extensions of - the term of a Visiting Scholar designation already in process prior to the adoption of the Visiting Scholar policy must go through the University approved process in Policy AC01 for the renewal and/or extension of the visit.

To the extent a Visiting Scholar commenced a visit to the University prior to the adoption of the policy, please follow the guidelines and the terms for the visit to which you previously agreed. Please certainly feel free to refer to Policy AC01 for guidance on the conclusion of the current visit. But, even if a Visiting Scholar commenced their visit before the University’s adoption of AC01, all Individual and/or Administrative Hosts (or their designees) must enter all existing Visiting Scholars in the University’s online document system, via DocFinity, by December 31, 2020.

All new prospective Visiting Scholars as of November 1, 2019 must follow the process for such scholars as defined by Policy AC01 and its supporting documents.
RECOMMENDED TIMING TO SUBMIT DOCUMENTS FOR VISITING SCHOLAR

It looks like there are many different University units potentially involved in the Visiting Scholar designation process. When should I be submitting the proper documents for appropriate review?

Please kindly submit all the required documentation for your proposed Visiting Scholar as soon as possible. The University system designed for Visiting Scholars allows for the submission of supporting documents on a rolling basis, so, as soon as you have a required document completed (for example, the Significant Financial Interest Disclosure Form or the letter of invitation or the Visiting Scholar Agreement for Visiting Scholars here for fourteen (14) consecutive days or more) from your proposed Visiting Scholar, please feel free to upload it to the system immediately.

For international visiting scholars on a J-1 visa sponsored by the University, we strongly recommend that you build in additional time for proper review by both the Office of the Vice Provost for Faculty Affairs and Global Programs. For instance, for all international Visiting Scholars who will require a J-1 visa interview at an American embassy or consulate, we strongly suggest, at a minimum, ninety (90) days before the proposed start of the visit to initiate all established processes in Global Programs’ iStart system. We also recommend that you upload the joint letter of invitation from the Individual Host and Administrative Host to the proposed international Visiting Scholar who will be here for fourteen (14) consecutive days or more upon issuance.

Regardless of the duration of the visit and regardless of whether the Visiting Scholar needs a J-1 visa sponsored by the University, all international Visiting Scholars are subject to an export review prior to arrival. All proposed international Visiting Scholars covered under the Visiting Scholar Policy who are not processed under established Global Programs processes, such as those not requiring University visa support or sponsorship, should be submitted to the University Export Compliance Office for export review at least thirty (30) days prior to arrive at University facilities using the online International Visiting Scholar Export Review Request Form available at the University Export Compliance website.

Once all approvals are completed, please allow an additional ten (10) business days for HR Shared Services to process the “Add Contingent Worker” form and complete the background check process. During this time, you can be working with the Identity Services office to obtain simultaneously the Visiting Scholar’s Access Account and/or email address.
TRAINING

What training must a Host provide the Visiting Scholar?

Pursuant to AC01, the Administrative Host is responsible for assuring that the Visiting Scholar:

1. Receives all required University training (e.g., health and safety for the facilities and equipment, if any, they will use or other mandatory training); and

2. Is aware of all applicable University policies and applicable local, state, and federal laws while visiting Penn State and reports any violations of University policy or law in accordance with University policy and procedure.

PRIVILEGES OF VISITING SCHOLARS

What are the privileges and limitation on the Visiting Scholar Designation?

Visiting Scholars who are at the University at least thirty (30) calendar days may receive a University ID card so that they may access public facilities such as the library. Upon completion of the Visiting Scholar’s term at the University, the Administrative Host must collect the University ID card from the Visiting Scholar.

If deemed appropriate by the Administrative Host and Individual Host, Visiting Scholars whose visits to the University are fourteen (14) consecutive days or more may be issued a Penn State email address to send and receive University correspondence. The e-mail address will be disabled upon the completion of their appointment.

If deemed appropriate by the Administrative Host and Individual Host, the Visiting Scholar may be allocated office space. The Administrative Host is responsible for issuing the appropriate office key(s). Upon the completion of the Visiting Scholar’s term at the University, the Administrative Host must collect all issued keys.

QUESTIONS

Who should I contact for questions about the Visiting Scholar approval process?

To the extent you have any questions about the Visiting Scholar Policy or the approval process of visits, please contact the Office of the Vice Provost for Faculty Affairs.

To the extent you have specific questions about Visiting Scholars at the College of Medicine, please also feel free to contact Susan Godfrey, Grants & Contracts Administrator in the Office of Research Affairs in the College of Medicine, at sgodfrey@pennstatehealth.psu.edu.

To the extent you have specific questions about Visiting Scholars in your particular College, Department, Institute, or Commonwealth Campus, please click here.