

Effective: August 1, 2012

PSOM VISITING SCHOLAR GUIDELINES

Purpose

These guidelines serve as a supplement to the Perelman School of Medicine's Visiting Scholar Policy (http://www.med.upenn.edu/policy/user_documents/VisitingScholarPolicySOM.pdf) to provide additional guidance to faculty and staff regarding the visiting scholar appointment process.

PSOM Visiting Scholar Eligibility

To be eligible for appointment as a "PSOM Visiting Scholar," an individual must meet the following criteria:

- hold a position at his/her home institution to which he or she could return at the end of the PSOM Visiting Scholar appointment at Penn
- hold a terminal degree in his/her area of expertise, usually a Ph.D., D.Phil., or M.D. (or equivalent)
- Is expected to visit and shall be appointed, for a defined period of not less than 3 weeks but not more than one year
- Must not be eligible for appointment as a postdoctoral trainee
- Must not be either full-time faculty or a student in training at the home institution
- Must not perform any clinical duties or have patient care responsibility while at Penn
- Must have appropriate financial support, including health coverage, from either from the host entity and/or from the home institution
- Must have a faculty sponsor at Penn

Considerations Prior to Appointing a Visiting Scholar

It is important to clarify the visitor's role and appropriately classify the visitor **at the time of appointment**. A "PSOM Visiting Scholar" appointment should only be given to those individuals who qualify as such under the PSOM policy (see above for eligibility criteria).

Prior to extending an offer and executing an appointment letter, an investigator is advised to first contact his/her departmental business administrator and the Office of International Programs. Considerations include:

1. **Purpose of visit:** Will the individual bring value to the investigator's program and do the investigator and department have the capacity to oversee the activities of the visitor? What role will the visitor have at Penn?
2. **Qualifications of the visitor and role at Penn:** There are various categories of visitors to the Perelman School of Medicine and definitions of the categories are listed below. If your visitor does not qualify for PSOM Visiting Scholar status please see definitions of other categories that may be more appropriate for your visitor (categories a – d).

PSOM Visiting Scholar Definition

The title of Visiting Scholar may be given to individuals who do not qualify for any of the above classifications AND meet the visiting scholar eligibility criteria outlined above. Examples of the types of individuals who would qualify for an appointment as a visiting scholar include: Scientists at a non-academic entity, such as a Research Institute/Foundation or Pharmaceutical Company; Instructors or Research Associates at academic institutions who are at Penn primarily to conduct research; and Clinicians who do not hold a faculty appointment in an academic medical center. Clinicians visiting on a J-1 visa must only observe and/or conduct research at Penn. They cannot be involved in clinical and/or patient care. Contact the PSOM Office of the Executive Vice Dean and Chief Scientific Officer at 215-898-2875 with questions. (J-1 visa).

Other category definitions of visitors to PSOM:

- a. Visiting Faculty: Applies to individuals who hold a full-time faculty appointment at another institution. Full-time appointment as a Visiting Professor is limited to three consecutive years, although normally such appointments are for one year or less. Please refer to the Faculty Handbook: http://www.upenn.edu/provost/associated_faculty and visit the Office of Faculty Affairs website for additional information: <http://www.med.upenn.edu/fapd/VisitingChecklists.shtml> (J-1 visa)
- b. Visiting Student: Applies to individuals who are students enrolled in a degree-granting program at another institution
 - For students of U.S./Canadian medical schools who wish to enroll in electives at the School of Medicine, see <http://www.med.upenn.edu/visitingstudents/> and contact the Office of Admissions and Financial Aid with questions.
 - For students from international medical schools, see http://www.med.upenn.edu/globalhealth/intl_students.shtml and contact the Office of Global Health Programs with questions
 - For students who are enrolled in a graduate degree program at another university and wish to conduct research at Penn, see http://www.med.upenn.edu/bgs/visiting_policies.shtml and contact the PSOM Office of Masters Programs and Visiting Students with questions. (J-1 visa)
- c. Post Doctoral Trainee: Applies to an individual who holds a terminal degree (PhD or MD) but does not have a full-time faculty appointment at another institution. The individual must qualify for a postdoctoral appointment at Penn. As a post doc, international visitors must be paid the appropriate stipend level and will be eligible to remain at Penn for up to 5 years. Contact the PSOM Office of Biomedical Postdoctoral Programs with questions: <http://www.med.upenn.edu/postdoc/> (J-1 visa)
- d. Employee: If the individual does not hold a terminal degree (and therefore does not qualify as a visiting scholar), is not a student, and you can provide salary support, the individual may be hired as an employee as long as he/she is under

the appropriate visa (most likely, H-1B visa). Individuals on an H-1B visa may work at Penn for up to 6 years. Consult OIP-ISSS for additional information.

Classification Checklist

Please use the table below in helping to determine whether a visitor to Penn is correctly categorized as a Visiting Scholar. Alternate suggestions for classification are offered in the right hand column.

QUESTION	ANSWER	ALTERNATIVE CLASSIFICATION
Holds position at home institution?	Yes	No (Postdoc, Research Staff, or Other)
Holds terminal degree?	Yes	No (Visiting Grad Student/Research Staff)
Stay is for 3 – 52 weeks?	Yes	No (N/A)
Faculty Member back home?	No	Yes (Visiting Faculty)
Trainee at home institution?	No	Yes (Visiting Grad Student/Postdoc)
Performing clinical duties?	No	Yes (Visiting Physician)
CLASSIFICATION	VISITING SCHOLAR	OTHER

Duration of visit

Visitors who will be at Penn for longer than one year are not eligible for an appointment as a “Visiting Scholar.” If you anticipate that the visitor will be at Penn for longer than a year, it would be best to consider an alternate classification (faculty, grad student, post doc, or employee).

Appropriate immigration mechanism: Based on the qualifications and role of the visitor (see above), please consult OIP-ISSS to determine the appropriate visa for foreign visitors to Penn. This should be done prior to the initial appointment and will assure that the visitor has the appropriate travel authorization from his/her home country prior to entering the United States. <http://www.upenn.edu/oip/iss/>

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