

## iGlobal Portal: One-Stop Shop for Faculty, Staff and Students

### *Submitter's Name*

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### *Sponsors*

Joanna Regulska, Vice Provost & Assoc. Chancellor  
Global Affairs  
Wesley Young, Director  
Global Affairs, SISS

### *Contributing Organizations*

Services for International Students & Scholars (SISS)  
Global Affairs  
Information and Educational Technology (IET)  
UC Davis Academic and Administrative Departments  
UC Davis Medical Center  
UC Davis Extension  
Graduate School of Management  
UC Education Abroad Program (UCEAP)  
Study Abroad

### *Technologies Utilized*

sunapsis and iGlobal: Java, Cold Fusion and MS SQL server  
Banner Oracle Database  
Student Exchange Visitor and Information System (SEVIS)

### *Project Timeframe*

November 2015 – current

### *Milestones*

11/2015 – Sunapsis go-live successful!  
12/2015 – iGlobal go-live: 1<sup>st</sup> student eform  
04/2016 – iGlobal go-live: Pilot for J-1 scholar requests  
09/2016 – iGlobal go-live: J-1 scholar requests for  
departments, faculty and scholars  
05/2017 – Paperless & automated for international students  
06/2017 – iGlobal go-live: self-service for J-1 scholars  
10/2017 – sunapsis go-live with first advanced internal  
workflow (checklist functionality)  
04/2018 – live with iGlobal H-1B pilot for departments  
05/2018 – iGlobal go-live: H-1B employee requests for  
departments, faculty and scholars

### *Key Contributors*

#### **Services for International Students and Scholars**

Jodi Barnhill (Systems Analyst), Simone Kueltz (Assistant Director),  
Tammy Silver (Assistant Director), Wesley Young (Director),  
Linda Heckert (Intl Student Assistant), Emily Taylor (Advisor),  
Mary Clabaugh (Advisor), Daniel Padron (Intake Advisor),  
Angela Hamilton (Intl Scholar Assistant), Robert Davis (Advisor),  
Gayle Oberlies (Advisor), Kathy Lighthall (Intake Advisor)  
Linda Younger (Admin Asst) & Kim Haky (Sr. Immigration Advisor)

#### **Information and Educational Technology**

Randy Jacobs (Programmer), Libby Bullock (Programmer),  
Rick Leos (Systems Admin), Dwayne Adams (Systems Admin),  
Dan Rackerby (Systems Admin)

#### **UC Davis Academic and Administrative Departments**

Najwa Marrush (Adviser, Center for Neuroscience)  
Lee Meddin (Admin Asst, BFTV Cluster)  
Heidi Edgington (Admin Asst, Food Chain Cluster)  
Jenny Tran (Payroll/Personnel Coordinator, Chemistry)  
Guyla Yoak (Admin Asst, Plant Pathology)  
Valerie Anderson (Acad Pers Coord, Public Health Sciences)  
Baljit Nijjar (Personnel Specialist, Plant Sciences)  
Kathy Miner (CAO, Social Sciences Blue Cluster)  
Toni Goodin (Personnel Spec, Primate Center (CNPRC))  
Audra Wilson (Financial Analyst, DEVAR)  
Raj Dhindsa (Acad/Staff Asst, Plant Sciences)  
Vanessa Esparza (Admin Asst, Genome Center)  
Maria Tuccori (Personnel Analyst, Plant Pathology)

#### **UC Davis Medical Center**

43 departments – too numerous to list all of the staff  
Pauline McAlpin (Acad Personnel, MED Hematology & Oncology)  
Shirl Fischer (Admin Spec Supervisor, MED Hematology &  
Oncology)  
Stephanie Lagala (Analyst, MED Cell Biol & Human Anat)

### *Relevant URLs*

<https://iglobal.ucdavis.edu>

### *Site Visits to UC Davis to Preview sunapsis/iGlobal*

2017: UT Dallas and University of New Mexico, Albuquerque  
2018: University of San Francisco and Stanford University

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### *Contributors*

#### **SISS**

Kai Cheng, Sharon Ericsson, Robert Nagel, Stephanie Partridge, Don Kreun, Katy Bill, Chris Porter & Maite Totorika

#### **UC Education Abroad Program (UCEAP)**

Alaina Crawford, Adrienne Lee and Meaghan White

#### **Graduate School of Management**

Christine Lyles, Alexandra Minnes, Jaqueline Romo, and Inger Maher

#### **Dean's Office Advisors**

CLS: Letia Graening, Andy Prettol, Angelina Applegate, John Clift & Sarah Mooney  
CAES: Brad Horton, CBS: Lori Bergum & COE: Jordan Dade

#### **UC Davis Extension**

Michelle Baker, Emily Normile and Becky Sisman

#### **UCD Study Abroad**

Paula Levitt

### *Summary of Project*

Sunapsis is an immigration compliance and international case management software system. The database allows for a client facing web portal for students, faculty, staff and scholars (clients) to submit requests and view request status. SISS migrated to sunapsis in November 2015, and successfully launched its web portal, iGlobal, in December 2015 with its first web form (known as eForm) for international students. Over the last two and one-half years, SISS team has designed and coded over 100 eForms. iGlobal provides a web portal for over 10,000 students clients to submit requests to SISS with encrypted file uploads, chain routing of request to appropriate faculty and staff approvers, digital signatures, workflow automation for SISS staff and full automation with Department of Homeland Security's SEVIS.

### *Has effected broad positive change at UCD and UCD Medical Center (continued)*

Deans' Office and Major Advisors have provided positive feedback on the ease with which they can recommend or approve student requests because they receive an email with a direct hyperlink to the student's information.

### *Innovative and has effected broad positive change at UCD and UCD Medical Center*

This innovation is essential to balancing the workload required to serve the increased number of internationals and keep up with the complex and changing immigration regulations that led to an increase in tracking, monitoring and reporting data. Prior to iGlobal, over 250 administrative staff completed paper requests based upon a series of communications and paper forms. Then, staff had to manually gather the requisite faculty signatures. Based upon a May 2018 survey of 200 staff, 60% reported they spent over 3 hours to process a J-1 paper request. With iGlobal, 60% reported it took less than 1 hour. In 2018, 1,500 J-1 applications will be processed. The reduction in time spent is at least 2 hours, resulting in 3,000 hours saved each year. The collaborative innovation between SISS and the campus stakeholders has fostered a sense of community amongst iGlobal users. As we bring more eForms online, time savings will increase.

Our SISS student team is able to review and process student requests in ½ the time (10 minutes versus 20 minutes.) In 2018, we will process over 10,000 requests. The result is a savings of 1,667 hours per year. In addition, when our advisors meet with students or respond to questions, they spend ¼ the time because all of the information and documents are online and easily accessible. We estimate an additional reduction in staff time of 5,000 hours per year. In total, we estimate that our student team saves over 6,667 hours per year compared to pre-sunapsis processing and advising times.

Our SISS scholar team can review and process a J-1 visiting researcher request in 1/3 the time (20 minutes rather than 60 minutes.) We process over 1,500 per year, so this is a time savings of 1,000 hours. Our team saves an additional 720 hours per year handling other requests. In total, our scholar team saves 2,220 hours per year. EForm processing allowed 2 scholar advisors to have a work space in Sacramento and enabled us to provide better support to the School of Medicine and School of Nursing.

### *Shareable and interoperable*

Opportunity to save every UC campus costs and time UC Davis is the first school in UC system to implement this leading edge immigration compliance and international case management software. It is likely that other UC campuses will opt to migrate from Ellucian's ISSM to the state of the art sunapsis system with its accompanying web portal. The time we have spent and lessons we have learned can be translated directly into savings for other UC schools.

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### *Project Overview*

Over the last decade, changes in federal immigration regulations coupled with increases in numbers of international students, visiting researchers and employees have required SISS to reexamine the way it does business. Often, there is little time to prepare for the regulatory changes that result in longer turn-around times for our staff to be able to provide needed immigration documents. As a major research institution, our faculty rely upon the availability of international visiting researchers and employees. About eight years ago, UC Davis Budget and Institutional Analysis determined that UC Davis could avoid a large budget shortfall by implementing the 2020 plan. This plan called for an increase of 5,000 undergraduate students. This 1:9 ratio of out-of-state to in-state students was the calculated formula to maintain our financial health. Since UC Davis is not a primary destination for domestic students, this meant that most of the 5,000 would be international students. From 2008 – 2017, the international populations that SISS supports have increased: the number of students and scholars grew from 1,768 to 6,778 and 1,931 to 2,224, respectively.

### *How the journey began*

Even before 2010, SISS realized the need for an innovative technology plan that would allow our team to better manage immigration compliance, eliminate needless manual data entry, put in place an electronic document management system (EDMS) and collaborate with staff to create a more efficient workflow to handle over 20,000 (and growing) immigration requests and transactions per year. Stepping into the fall of 2012, the increase in workload and shortage of physical space for both staff and paper files expedited our need for innovation. After studying the problems and many discussions, the team decided in late 2013 to move forward with the plan to migrate to a new state of the art database, sunapsis. With sunapsis, our team realized that we could leverage the built-in immigration compliance alerts, document upload functionality, swim-lane workflow feature and web portal for our clients to address our needs and requirements as well as dramatically improve our work environment and customer service.

In the fall of 2015, SISS migrated over 30,000 immigration records, hundreds of thousands of documents and a Banner data feed schema from ISSM to sunapsis. This was an especially challenging implementation due to the fact that there was only one staff member, SISS Systems Analyst, at UC Davis familiar with the database tables for ISSM and sunapsis as well as how these database tables related to immigration regulations. Also, of approximately 29,000 employees, only 21 at SISS have access to and use the campus immigration case management database. In the 2018 – 2019 academic year, these 21 staff will provide services to over 10,000 international students and employees, as well as over 500 administrative staff, researchers and faculty. The team faced significant hurdles with this transformation from an antiquated database with manual data entry from paper forms to leading edge software with a self-service web portal for thousands of stakeholders.

## **What we accomplished – Stories from sunapsis and iGlobal users**

### *International Student, Visiting Researcher and Employee User Stories*

As of fall 2018, our international population will include over 10,000 students, visiting researchers and employees from over 125 countries.

On one occasion, our front desk staff member noted that a visiting research scholar arrived at our office requesting help for departing the US immediately for a family emergency. The scholar needed a travel signature quick but did not have the needed approval from her Principal Investigator (PI). Prior to iGlobal, she would be required to complete a paper form, walk it across campus (or back to the medical center) to her principle investigator's (PI's) office, await availability for

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signature, then walk it back to SISS. With iGlobal, the scholar was able to fill out the travel signature request online and reach out to the PI via phone to request digital signature. Within 10 minutes, our international scholar advisor was able to provide the needed immigration document, and the scholar was able to make her flight.

Students, scholars and departments have access to information as needed (including any day of the week or time of day), can submit their requests without taking up administrative and advising time for submissions that do not require a discussion. Countless students who have experienced both the paper and online iGlobal system have expressed gratitude for this streamlined and user-friendly innovation because it reduces the amount of running around and coordination required for a successful request.

### *Our International Office Front Desk Team Story*

Our front desk operations are handled by one staff member in a small space. Before iGlobal, it was not unusual to have lines full of students, scholars, departmental contacts and others waiting for help, all while the phone lines would be ringing. With self-service available at iGlobal, we have eliminated at least 1/2 of this traffic. The front desk staff member is now available to spend time with each person who visits our office to provide assistance to those who have more complex or emergency cases.

### *Our International Office Student Team Story*

In the academic year of 2018 – 2019, our student team of 5 advisors, 3 intake advisors and 1 administrative staff will provide immigration advising to approximately 8,000 students and alumni on UC Davis work authorization. The fact that students are able to submit their requests using iGlobal is the way that we are able to realistically provide advising services, help when students are in trouble and issue immigration documents in a timely fashion. Sunapsis allows our team to easily track complex situations, and this is especially helpful when triaging amongst campus partners and outside stakeholders such as Department of Homeland Security. Our student team reports that working in sunapsis and iGlobal has made face-to-face meetings with students more efficient and effective. Because they do not have to spend much time discussing how to request documents or actions, they can spend more time discussing students' needs. The eForms are well designed and provide step by step instructions so students are able to do most everything on their own. Now that we have fully transitioned to sunapsis, and are paperless, students quickly learn that all their document needs can be met by going to the iGlobal portal. Many obtain what they need and come to our office only to pick up their documents. This saves both them and staff across campus time.

Sunapsis is an amazing repository of all documents and notes relevant to a student's experience. As we have moved every benefit and required interaction with students online we can keep notes, upload key documents, and automatically send email reminders and alerts with ease. Having a single location for all records related to a given student streamlines our work. The Banner/iGlobal/sunapsis/SEVIS interface, with templates that enable auto-completion of information in the SEVIS database is the biggest time savings. This automation allows advisors to spend more time verifying compliance of complex immigration regulations and less time manually entering data resulting in a reduction of data entry errors.

### *Our International Scholar Team Story*

Our scholar team consists of seven (7) advisors and administrative staff. Our business process and workflow is very complex as scholars cannot initiate their own request for many immigration documents. Administrative staff are required to initiate the process and invite the scholar to complete J-1 and H-1B eForm requests while they simultaneously complete

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eForms and invite faculty, department chairs and deans to review and approve requests. The project required us to use an agile process, create training presentations and videos, provide a pilot of our J-1 eForms, lead a hands-on training for over 200 administrative staff, and create other tools, such as a living FAQ and a self-service department contact profile website.

Implementing sunapsis has streamlined our J-1 scholar request procedures, making the process more time efficient and environmentally friendly. We configured iGlobal so that it walks the clients through each step so that when the request reaches us, it includes all necessary information and attachments. In the occasions where something is missing, it is easy to use sunapsis to follow up with the relevant party. Since everything is submitted electronically, it is easy to vet the information against documents submitted. With multiple staff members working on the same request, having an electronic system also makes it easy to send records and communicate relevant information within our office and allows our staff to access records from any location. There are also many features that help us serve our clients better. For example, the client view feature allows us to see exactly what the client is seeing at iGlobal so I can help them. Because the clients can simultaneously complete steps at iGlobal, the routing time became much faster for the application to move through the process. Digital signatures for approvals and certifications as well as document upload functionality have proven invaluable to everyone involved in the process. When a new scholar arrives, the scholar is able to check in online instead of visiting SISS in-person. iGlobal automatically sends the needed department contact notification about the scholar check-in.

In the past departments were the main contact and responsible for gathering all information, preparing the application package, communicating with professors and chairs, collecting their signatures and managing all of the back and forth when information or a document was missing. Now with iGlobal, the department contact is responsible for a smaller part and is able to easily monitor the status of scholar and faculty actions. SISS staff is also able to easily monitor the application process allowing iGlobal to do the heavy lifting with respect to sending out communications regarding the application status.

### *Our Systems Analyst and Management Team Story*

The iGlobal innovation has improved our professional image. In the year 2018, people in general believe they have certain IT rights. More people are quite technologically savvy, so implementing iGlobal has provided the opportunity for UC Davis to “catch up” with the technological times and provide a higher level of service which has been an important component of strategic planning in Global Affairs. Sunapsis and iGlobal have proven to be wonderful morale builders across campus.

## What's next?

This isn't the end of our journey. The foundation is in place and the team is ready for the next stage which includes further workflow automation through sunapsis checklist functionality, adding eForms so that our scholar team can be paperless, adding a mobile app with push notifications (fall 2018) and becoming fully paperless and automated by June 2019. We have laid the groundwork for other UC schools who may want to leverage our expertise to streamline their adoption of this powerful, customizable software. Finally, Global Affairs and the rest of campus needs our expertise, input and time for important initiatives that our team has not been able to fully participate in. We know that in the coming years it will be more of a reality for us to devote the time needed to be part of campus projects that will impact our international population, our university's reputation and our Global Affairs strategic planning for a global education for all. We had a dream that one day our SISS team could enjoy the benefits of 21<sup>st</sup> century technology. That dream has come true, and it feels really wonderful to have worked as a team to accomplish what we have, and to have had the support and cheerleading of our colleagues across the main campus and medical center.

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