

## Dear International Faculty and Scholars:

### Welcome to the United States and the University of North Carolina at Charlotte!

We are pleased to have you join our community of international faculty and scholars. We hope your experiences here will be rewarding.

This handbook, published by the International Student/Scholar Office (ISSO), addresses general concerns you might have, and directs you to some specific University and community services which you are likely to need. The handbook supplements other university publications and is intended to serve as a reference source specifically for international faculty and scholars. We hope you find it useful as you begin to get settled here, and that it will continue to provide you with helpful information throughout your stay at UNC Charlotte. Should have any questions that are not answered in this handbook, we encourage you to contact our office [intlssso@uncc.edu](mailto:intlssso@uncc.edu) or (704-687-7781) for assistance.

We look forward to working with you and extend you a warm welcome.

Sincerely,

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Map of UNC Charlotte

# International Student/Scholar Office (ISSO) Overview



## Introduction to the Office

The ISSO coordinates services for international students, faculty, staff, and visitors. It assists with all matters of special concern to them and serves as a referral source to other university offices and academic departments. The ISSO is a division within the Office of International Programs.

The office is located in room 202, College of Health & Human Services Building (CHHS). The hours are 8:00 am to 5:00 pm, Monday through Friday. You may reach us by phone at 704-687-7781 or email to [intlssso@uncc.edu](mailto:intlssso@uncc.edu). If you need help or information you are encouraged to make an appointment.

## Orientation for International Faculty and Scholars

Upon arrival to UNC Charlotte, you are asked to meet with staff in the International Student/Scholar Office who will provide you with orientation information based upon your specific needs and circumstances.

## ISSO Services Available

**Advising** – Assistance with a variety of matters related to employment, immigration, personal and non-academic concerns.

**Campus Resource/Liaison** – Information on all aspects of life at UNC Charlotte

**Immigration Documents** – Consultations on immigration-related matters. This handbook has a section on immigration-related regulations with general information for your immediate reference, but you are encouraged to become familiar with the specific regulations which apply to your personal situation. All individuals have rights and limitations which govern their non-immigrant status; it is your responsibility to ensure that you comply with these regulations.

**Other Programs** – The Office of International Programs offers other programs and services that you might want to take advantage of during your stay. These include:

- Phi Beta Delta, Honor Society for International Scholars
- English Language Training Institute (ELTI)
- International Coffee Hours
- Host Family – a friendship program

**Language and Culture Consultations for International Faculty** – ELTI offers a consulting service for international faculty who wish to improve their English language and/or presentation

skills. Consultations are free to the faculty member and may include classroom observations, videotaping, and language practice. A focus on U. S. classroom culture is emphasized. The content of the consultation is confidential, although the faculty member's name is submitted to Academic Affairs for reporting purposes. **For more information about these services, contact the ELTI office, Room 267, CHHS, phone number 704-687-7742.**

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## UNC Charlotte Information



### **Introduction to UNC Charlotte and History**

(<http://www.uncc.edu/landing/about#history-and-quick-facts> )

UNC Charlotte can trace its lineage to 1946 with the establishment of the Charlotte Center of the University of North Carolina. It became Charlotte College in 1949. In 1963, Charlotte College became a four-year, state supported institution. In 1965, the N. C. General Assembly created the University of North Carolina at Charlotte, which became the fourth campus of the consolidated University of North Carolina. Today UNC Charlotte is one of the 16 campuses of the University of North Carolina system.

UNC Charlotte is a comprehensive university with an enrollment of over 26,200 students. Undergraduate, masters & doctoral options are offered in the seven colleges: College of Liberal Arts and Sciences; College of Arts & Architecture; The Belk College of Business Administration; The William Lee States College of Engineering; College of Education; College of Health and Human Services, College of Computing & Informatics & University College.

### **Communications / Getting Started**

**Employment and UNC Charlotte ID card Clearance** – Employment related forms and paperwork are handled in the Human Resources Department. If you are an exchange scholar, not employed by the university, you will be issued an authorization card only, so you may obtain your campus ID card and a parking permit. If you will be a full-time or part-time employee of the university you will be issued an authorization card, and you will fill out the following forms:

- I-9 employment verification form
- Tax Forms
- Patent agreement forms
- Personnel Profile Information Packet (Full time employees only)
- Emergency notification sheet (Part-time employees only)

You will need to bring the following documents to the Human Resources department in order to complete your clearance:

- Passport
- I-94 and other immigration status documents
- A memo from your sponsoring academic department which details your appointment at UNC Charlotte

If you will be paid by the university you must obtain a **Social Security Card**. Information about how to apply for one is included in this handbook in the *Money Matters Section*. **The Human Resources Department**, located in the King Building, 2<sup>nd</sup> floor, is open from 8:00 am to 5 pm, Monday through Friday and you can reach them by telephone at 704-687-2276.

**A Campus ID Card** is used for identification and access to many UNC Charlotte services such as: the library, the gymnasium, and dining services. To obtain an ID card you must get an authorization card from the Human Resources Department and take it to the ID office in the Student Union. It is recommended that you get an ID card as soon as possible after you arrive and carry it with you at all times when on campus. **The ID Office** is open from 8 am to 6 pm, Monday through Thursday and 8 am to 5 pm on Fridays. You can reach them by telephone at 704-687-7040.

**Phone Services** – Your host department will arrange for on campus phone access for your use at work. All campus phones have 'voicemail' capability. All voice mailboxes are protected by a confidential pass code set-up by each mailbox owner. When you access your mailbox for the first time, a user tutorial is automatically activated. This tutorial will guide you through your first mailbox session, explain how to record a greeting, and prompt you to set-up a pass code. Contact **IT Service Desk** at 704-687-5500 (on campus 7-5500) for assistance or send them an email: [help@uncc.edu](mailto:help@uncc.edu)

**Email Account** – Email can be sent to any UNC Charlotte student, staff, faculty or scholar through the network. (Your academic department should notify ITS (Information and Technology Services) to set up your account. If you have any questions please contact ITS at extension 7-5500.)

**Post Office (Mail Center)** – located in the basement of Prospector. The mail center will assist you in sending letters, packages and purchasing stamps. Any posted item should always include a return address. It is open from 9 am to 4 pm, Monday through Friday. The phone number is 704-687-2350.

**UNC Charlotte Telephone Directory** – provides a list of addresses and phone numbers of faculty, staff, students, and offices. Copies are available through your department. This information can also be accessed on the web at <http://search.uncc.edu/people/?p=search>.

**Charlotte Telephone Directory** – provides a listing of Charlotte area business and residences in alphabetical order. The yellow pages provide listings of services and businesses in alphabetical order by subject. You can also access the yellow pages via internet at [www.realpages.com](http://www.realpages.com).



## Problems/Emergencies

**Campus Police** – The Department of Police and Public Safety exists to protect the life and property of the UNC Charlotte campus, to enforce local, state and federal laws and university regulations on campus. **In case of an emergency the phone number is 704-687-2200, or if you are on campus 7-2200.**

**Counseling Center** – Professional staff members are available, by appointment to assist faculty, staff and students with personal and academic difficulties. Complete confidentiality is maintained. The offices are located in the Atkins Annex building. The telephone number is 704-687-2105 or on campus 7-2105. They also maintain a **Disaster Distress Helpline** which is free and confidential. **1-800-985-5990.**



## Leisure Time

**Dining Services** – are provided by Chartwells food service. There are several dining facilities on campus from which to choose:

- Student Union: Starbucks, Einstein's bagels, Wendy's, etc.
- The Main Street Market, located in the lower level of the Cone Center
- The Prospector Café & Chick-fil-A: located in the Prospector Building
- The Residential Dining Hall, located adjacent to the Moore-Sanford Halls
- The Crossroads Café, located by the Gardens in the back of campus

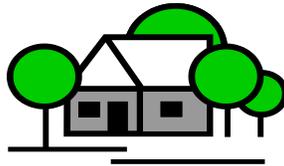
All of these food service locations serve breakfast and lunch during the academic year. Faculty and staff often use the Prospector because it has a Faculty/Staff dining room. You can pay by cash or by putting money on your ID card. This is done at the ID office in Student Union. Use of your ID card to pay for meals saves you the sales tax on the purchase. More info at [www.auxiliary.uncc.edu](http://www.auxiliary.uncc.edu)

**Use of Recreational Facilities** – The Student Activity Center (SAC) and Belk Gymnasium contain a weight training room, swimming pool, aerobics area, equipment check-out service, locker/shower facilities, basketball, volleyball, badminton, racquetball, handball, and squash. Recreational facilities are available for use during the times specified in the monthly gym schedule. A fee is required for use of some of the facilities. Copies of the gym schedule are available through the Intramural Office. [www.recservices.uncc.edu](http://www.recservices.uncc.edu)

### **Campus Publications:**

- Campus News – <http://campusnews.uncc.edu/> provides information more directed to faculty and staff.
- The University Times – [www.uncc.edu/life/smp/smp\\_utimes.html](http://www.uncc.edu/life/smp/smp_utimes.html) is a student operated newspaper.

## **Living in the Community**



### **Housing**

#### **On-Campus Housing**

The University has temporary and short term apartments available on campus for visiting international faculty and researchers. Arrangements for living in these apartments are made through your sponsoring academic department.

#### **Costs of Off-Campus Housing**

Apartment costs vary greatly. A one bedroom apartment could cost anywhere from \$500 - \$1000 per month, depending on the location and level of luxury; a two or three bedroom apartment could range from \$700 - \$1200 a month. Some rentals do not include utility costs (gas, heat and electricity). This can run an additional \$30 - \$110 per month, depending on apartment size and your usage of energy. Unless otherwise specified, most apartments are also unfurnished.

#### **Locating Your Apartment**

If you do not own a car, your transportation options may include car-pooling, living near a Charlotte bus route, or living within walking distance of the university.

#### **The Best Apartment Finding Resources**

- Dean of Students (Off-campus housing) <http://www.dso.uncc.edu/offcampus/index>
- The ISSO has a list of off-campus apartment complexes near UNC Charlotte
- The Campus News or the University Times listing
- The Charlotte Observer, the local daily newspaper and bulletin boards on campus

When determining the best place for your needs, keep in mind the following:

- Is it in a safe area?
- What are the conditions of the lease?
- If there is no lease, what are the conditions of tenancy?
- How much is the security deposit? How and when is it returned?
- How do you arrange for repairs?
- How is the building secured? Are the locks and doors secure?
- What provisions are made for fire safety?
- Is the apartment insured?

- What kind of heat is provided? Is it included in the rent? If not, how much will the monthly cost be on average?
- What utilities are included in the rent?
- Where are the nearest laundry facilities? Stores? Restaurants?
- Is it located near the school (s) you want your children to attend?

## Reminders

When you are ready to rent your apartment keep these important points in mind:

- **Read** the agreement carefully BEFORE you sign it.
- **Learn** how to operate the dishwasher and other appliances. If you don't know, be sure to ask the apartment manager.
- **Notify** the manager at least one month in advance (be sure to check your lease contract) if you are moving out. You lose your deposit if you leave before your lease is complete or if you leave the apartment dirty or damaged.

## Residential Telephone, Internet and Cable TV

When you rent an apartment, you must arrange for your own telecommunication services. There are several major providers including **AT&T (Bell South)** [www.att.com](http://www.att.com) and **Time Warner Cable** [www.timewarnercable.com](http://www.timewarnercable.com). You must contact them to select a service plan and schedule an installation. A deposit is usually required. Also check with your apartment complex to find out if certain services may be included in your rent. Telephones may be purchased from many local stores. **You may want to check into cellular phone companies and their rates rather than having a land line.**

## Utilities

Electric service is provided by **Duke Energy Company**. Contact them at **1-800-777-9898** or <http://www.duke-energy.com/north-carolina/service.asp> . You must also fill out an application for service and pay a deposit of about \$100.00.

Gas service is provided by **Piedmont Natural Gas Company** contact them at **1-800-752-7504** or <http://www.piedmontng.com/about/aboutpng/contactus/contactus.aspx> .

Water service is provided by Charlotte-Mecklenburg Utilities. Contact them for service at 704-336-7600, 311 (local calls only) or

<http://charmeck.org/city/charlotte/utilities/Pages/Home.aspx> .

## Garbage, Recycling and Solid Waste Services

The City of Charlotte maintains a regular schedule for the collection of garbage and recyclable materials. Ask your neighbor or the manager of your apartment about the schedule and the types of containers and bags that are acceptable. For additional information call **311** or <http://charmeck.org/city/charlotte/SWS/CurbIt/Pages/Curb%20It!.aspx>

## Furniture

Most apartments do not have furniture. Furniture rental is available from these companies:

### Aaron Rents

5123 South Boulevard  
Charlotte, NC 28217  
704-679-9195

### Val-You Furniture

5716 N. Tryon Street  
Charlotte, NC 28213  
704-598-0450

### Cort Furniture Rentals

4744 South Boulevard  
Charlotte, NC 28217  
704-527-0300

## Insurance- Residential

Most Americans purchase homeowners or renters insurance for their home or apartment. This type of insurance is secured to protect the contents of your home or apartment in case of loss due to fire and / or theft. These policies are usually paid quarterly and can be purchased through any major insurance company here in the United States. To find a list of these companies look up "Insurance" in the yellow pages of the telephone directory or check the internet for a listing. You should check different companies and compare costs for adequate coverage.

## Transportation



**Charlotte Transit** – [Charmeck.org/departments/CATS](http://Charmeck.org/departments/CATS) – There is a regular bus service Monday through Sunday from UNC Charlotte to various destinations in Charlotte. Bus schedules are available in ISSO. Contact the CATS website for routes: [www.ridetransit.org](http://www.ridetransit.org) or phone: 704-336-7433.

**UNCC Shuttle Service:** Various routes through the campus Monday - Friday. It is free.

See the website for routes: [www.parking.uncc.edu/shuttle/](http://www.parking.uncc.edu/shuttle/)

**Taxis** – There are several taxi service companies in Charlotte.

Look in the yellow pages under "Taxis" for a complete listing.



## Automobiles

- **Driver's License** –

[http://www.ncdot.org/dmv/driver\\_services/drivingpublic/applying.html](http://www.ncdot.org/dmv/driver_services/drivingpublic/applying.html)

The operation of an automobile without a valid driver's license is illegal and punishable by a fine and / or jail sentence. An international driver's license (which is valid for 30 days) and a valid license from your home country are acceptable. However, it is recommended that you obtain a North Carolina driver's license.

To obtain a driver's license in North Carolina you must:

- 1) Present the following personal identification documents having the exact same spelling of your last name: passport, official letter from the university which provides the necessary information, and proof of residence.
- 2) Pass a written test.
- 3) Pass a road (driving) test and a vision test.
- 4) Provide proof of car insurance. If you do not intend to have your own car, ask to sign the waiver form freeing you of the insurance obligation.
- 5) Pay a fee of \$20-\$32 depending on your age

- **Driver's License Office Locations:**

- 1) 8446 N. Tryon (near University Place), Charlotte 704-547-5786
- 2) 2192 Kannapolis Highway, Concord 704-782-7214
- 3) 6016 Brookshire Blvd. Charlotte 704-392-3266

- **Purchasing a Car** – When buying an automobile, you must receive the *Certificate of Title and Bill of Sale*. You cannot register a car without these papers. When selling an automobile these papers will be given to the buyer by you.
- **Vehicle Registration** – The State of North Carolina requires all automobiles, motorcycles, and other motor vehicles be registered and insured at the time of purchase or transfer of title. Written proof of ownership is required to obtain the license plate. To register your car you will need to present the following to the Department of Motor Vehicles (DMV) registration office: title, registration card, and proof of insurance. Registration and license plates are available at 4612 Hwy 49 in Harrisburg, telephone number 704-455-9517.

- **Automobile Insurance**

An operator of an automobile in an accident may be responsible to pay for any injuries and damage. If you own an automobile, it is required that you obtain liability insurance. For a listing of insurance companies, see the yellow pages in the telephone directory.

- **Vehicle Safety / Accidents**

*All drivers and passengers in motor vehicles are required by law to wear seat belts at all times.* If stopped by a police officer while not wearing a seat belt you are subject to a \$100.00 fine for the first offense.

In addition, all young children must be properly restrained using a special car seat or booster seat placed in the back seat of the automobile. The required seats needed are determined by the child's age, height and weight.

**It is illegal to have an open container of alcohol in the car.**

An operator involved in any accident should seek skilled advice at once. At the time of the accident, someone should be asked to telephone for police assistance. The police will arrange for tow trucks and ambulances if needed. At the very least, the police will require you to fill out a written report within five days following the accident. *Do not leave the scene of an accident until allowed to do so by the police officer.* Notify your insurance company immediately.



**Parking on Campus**

You must buy a parking decal to park on campus, unless you park at the parking meters. *You may purchase a parking decal at the UNC Parking & Transportation Office, in the Facilities Operations Building.* [www.parking.uncc.edu/](http://www.parking.uncc.edu/)

## Schools



### Public Schools

Every city in the US is required to provide free public education through grade 12 to its resident children. If you wish to enroll your children in the Charlotte-Mecklenburg School System (CMS) follow the steps below:

1. Call the CMS International Center at (980) 343-3784 and set up an appointment to enroll your child. Additional information is on their webpage: <http://www.cms.k12.nc.us/cmsdepartments/ci/esl/ic/Pages/contacts.aspx>
2. Bring the following documents with you: proof of birth (birth certificate or passport); immunization record; transcript or official school record from your home country (official transcript is required for high school students, 15-18 years of age); results of any language proficiency tests if taken in the last six months; and proof of your US address (lease or utility bill).
3. At the Center you will complete a registration form and your children will take a language proficiency test if they have not done so already.

### Private Schools

Private schools vary according to affiliation (e.g., religious), location, cost, level (primary, secondary or high school). You can find a listing of these in the *yellow pages* under “Schools”. Enrollment procedures vary with each school so be sure to inquire about these when choosing which school would be best for your child.

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## Healthcare



In the US, each individual is responsible for paying the costs of his/her own medical care. The cost of medical care is the fastest rising expense in the US today. **Medical insurance is an absolute necessity in the U.S.**

There is a broad range of health care services in the local community. Depending on your needs and your employee status at UNC Charlotte, some of these services might be provided by the university at no extra cost to you. For other services, you may be required to pay a partial or full amount. Do not wait until you become ill to learn about these services; learn where and how to get care before you are in a situation which requires medical attention.

## **Health Insurance**

**As a J-1 scholar, you and members of your family are required to have health insurance coverage for the entire length of your J-1 program.** Medical care is extremely expensive. International students, scholars, and family members cannot rely on any government assistance with medical expenses as few states approve even partial Medicaid to nonimmigrants. Overall, international students and scholars are responsible for their medical costs unless they are covered by health insurance. Do not take risks which could leave you permanently in debt to a hospital or physician. Most insurance plans will not cover “pre-existing conditions”. For women of child-bearing age it is strongly recommended that you purchase insurance that includes pre-natal and maternity benefits.

### **University**

**Only those individuals in H-1B status or J-1 status who have full-time academic appointments for one academic year or more are eligible for University sponsored insurance.** The benefits become effective on the first day of appointment for academic-year appointments. An orientation conducted by Human Resources will explain health benefits in detail.

Those in J-1 and H-1B status who have appointments for less than one year or are being funded from a non-UNC Charlotte source, e.g., home government, are ***not eligible for university-sponsored health benefits***, but they are required to have some sort of health coverage through an approved health insurance company. ISSO can help J-1 scholars identify plans that meet Department of State requirements.

### **International Underwriters**

This provides short-term health insurance with a company whose plans are designated for participants in international education activities. Forms are available in the ISSO. Be sure to read them thoroughly before selecting an insurance plan appropriate for your needs.

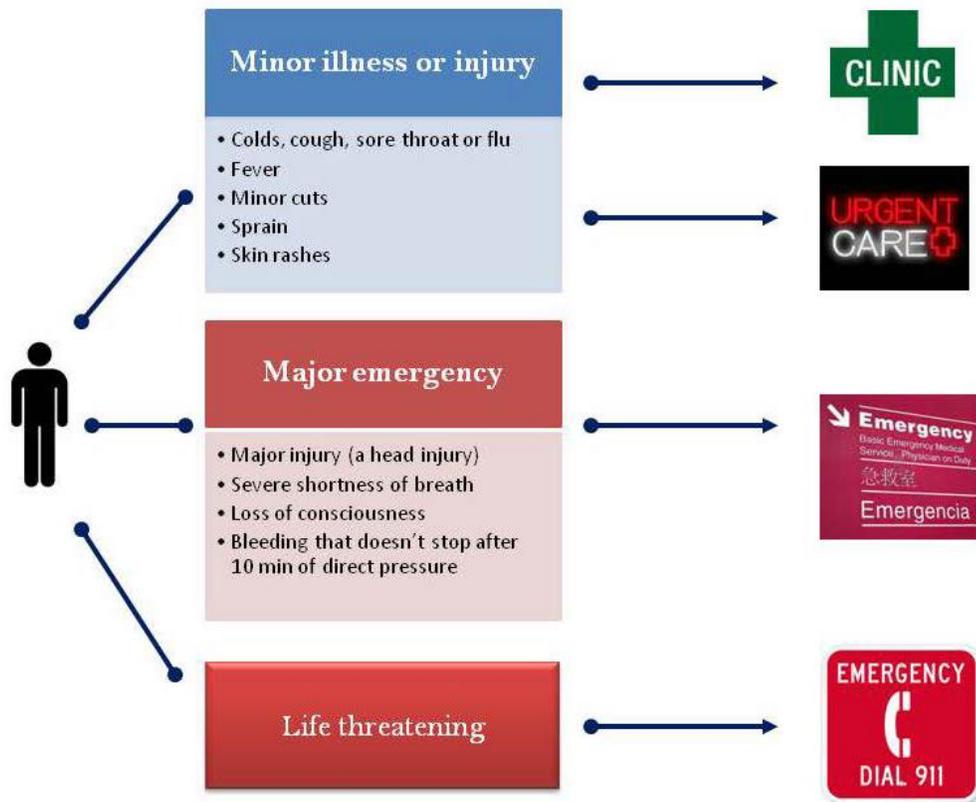
### **Independent Agents**

Finally, you may purchase health insurance through an independent insurance agent. Information can be found in the *Yellow Pages* under “Insurance”. You should obtain a written description of the policy before purchasing.

### **Healthcare Providers and Facilities**

Different health conditions warrant seeking different healthcare providers and facilities. Unless you are faced with a true emergency, you should expect to schedule a medical appointment. This

includes routine examinations and diagnostic tests. For situations that emerge, but are not life-threatening, there are walk-in clinics and urgent care centers. The diagram below may help you understand where to seek the most appropriate and cost effective care.



## Hospitals

Every hospital has an emergency room. For a true emergency, **CALL "911" on the nearest telephone, including cell phones.** Give your exact location, a brief description of the situation, and ask for an ambulance to come immediately. Services provided are strictly for emergencies and should not be used for minor problems which can be attended to by a private physician or community clinic. Hospital emergency rooms in the immediate community are:

Carolinas Medical Center  
8800 N. Tryon (@ W.T. Harris  
704-863-6000

Carolinas Medical Center  
1000 Blythe Blvd.  
704-335-2000

Presbyterian Hospital  
200 Hawthorn Ln.  
704-384-4000

**Physicians:** If you are not a member of a specific health care program, e.g., HMO, you can obtain the most thorough health care through the services of a private physician. The Student Health Center on campus, can refer you to both general and specialist physicians. Look in the *Yellow Pages* under "Physicians" for a complete listing.

**Dentists:** The Student Health Center x7-7400 can refer you to reputable dentists in the university area or you can find a comprehensive list in the *Yellow Pages* under "Dentists".

**Clinics:** There are a variety of health clinics available. The types of services offered by each vary, as do the costs. Some clinics let you pay on a "sliding scale," which means your costs are determined by your financial situation and your ability to pay. Some clinics have comprehensive services; others are for specific health problems only. Following is a sample of the clinics in the Charlotte area:

**Planned Parenthood** is a nationally recognized clinic and it offers pregnancy testing, birth control information, referral services, and contraceptives as well as routine gynecological examinations. **4822 Albemarle Road, Charlotte 28205 704-536-7233**

**Carolina Center for Women** specializes in Women's health issues.  
**421 N. Wendover Road, Charlotte 28211 704-375-7097**

**Mecklenburg County Health Department** has comprehensive services.  
**2845 Beatties Ford Road, Charlotte 28216 704-336-6500**

**Note:** The Health Center is available for referrals for faculty and staff but only provides healthcare services to students.

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## Mail

**U. S. Postal Service** – is on campus, located in the Prospector building and is available for mailing letters and packages. **Contact: x7-2350.** Additional mailing services, including UPS and Fedex, are available through Union Station in the Student Union x7-5803.

**Mailing Address** – Please keep the International Student/Scholar Office (ISSO) informed of your current mailing address.

**Change of Address** – If you change your mailing address during your stay here, please make sure you notify ISSO and the Human Resources Department as soon as possible. It is recommended that you fill out a *change of address form* at the Post Office so you can have your mail forwarded to your new address. You may pick up one of these forms at any Post Office branch. You will need to submit your completed change of address form to the Post Office branch which served your old address.

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## Money Matters

### **Banking**

It is not safe to carry large amounts of cash with you. If you have not done so already, you should open a checking account at a nearby bank. Personal checks and debit cards are acceptable almost everywhere with appropriate identification (driver's license, passport, faculty/staff ID). Checks should always be used to pay bills; never send cash through the mail.

Different banks have their own policies on service charges and minimum balance requirements for checking accounts and interest yields on savings. Be sure to ask for complete information about the various plans at each bank you call or visit.

Located in front of the UNC Charlotte Bookstore are the *automatic teller machines* (ATMs). These machines allow you to withdraw cash from your account 24 hours a day if your bank participates in the network. ATMs are easy to find in Charlotte and all over the United States. Some banks may charge a fee for using the ATMs of other banks. You may wish to ask about such a service and its specific conditions when you inquire about opening an account.

When opening an account you must present identification (passport, immigration document) and proof of address and/or employment. Check the yellow pages for complete names and addresses of banks in the area. Some of the banks with branches in the university area are Bank of America, Wells Fargo, and BB&T. If you are employed by UNC Charlotte you may also open an account at the North Carolina State Employees Credit Union (SECU).

### **Employment and Tax-Related Matters**

All international scholars are required to contact the Tax Office and complete the Foreign National Tax Form. Contact Rebecca Urquhart: [rmurquha@uncc.edu](mailto:rmurquha@uncc.edu). She will review your eligibility for tax exemptions based on a tax treaty benefit and can assist you with the claim form I-8233, available in the Human Resources Department and the Payroll Office.

If you earn income during your stay at UNC Charlotte, there are three different types of tax with which you must be concerned:

- 1) United States Federal Income Tax
- 2) Social Security and Medicare (FICA)
- 3) North Carolina State Income Tax

Federal and state income tax forms must be filed by April 15<sup>th</sup> each year. The ISSO offers seminars on how to prepare your tax forms in the early part of the spring semester.

### **Federal Income Tax**

Collection of Federal Income Tax is the responsibility of the U.S. Internal Revenue Service (IRS). Non-immigrants employed in the United States are subject to federal income taxation on wages earned in the United States unless exempt based on a tax treaty. The following is a

summary of U. S. government requirements (for more detailed information regarding your tax obligations, obtain the following publications:

- 519 (U.S. Tax Guide for Aliens)
- 520 (Scholarships and Fellowships)
- 901 (Tax Treaties)

These publications, information, and personal assistance are available from the toll free federal tax information number 1-800-829-1040 or you may contact the local IRS office at 6635 Executive Circle in Charlotte. (These and other forms and publications can also be obtained by calling 1-800-829-3676). As supplies last, they are also available in the ISSO or [www.irs.gov](http://www.irs.gov).

The federal tax obligations of foreign nationals are determined by several factors:

- Visa type
- Length of residence in the U.S.
- Purpose for being in the country
- Intent to return to the home country or to remain for an extended period in the United States
- Country of citizenship
- Type of income

Different combinations of the above listed factors result in different tax obligations.

The first consideration is one's status as a resident or nonresident for tax purposes. In general, the following guidelines apply:

- **F-1 students and J-1s in the student category** are considered non-residents for tax purposes in their first five years of study. After five years, F-1 and J-1 students are presumed to be residents for tax purposes by the IRS.
- **J-1 scholars (non-students) are considered nonresidents** for tax purposes during their first two years in the United States. After two years, J-1 faculty, researchers, and international visitors are presumed to be residents for tax purposes.
- **J-1 dependents** have the same tax status as the J-1 principal.
- **Individuals holding H-1 status** are subject to the "substantial presence test" as defined in *IRS publication 519* to determine residence status for tax purposes. [www.irs.gov/pub](http://www.irs.gov/pub)

Treaty benefits take precedence over other criteria in determining resident/non-resident tax status. Individuals who claim exemption from taxation based on a tax treaty are considered non-residents for tax purposes.

**Taxation of Residents:** If you are a resident for tax purposes, you

- Pay tax on your entire worldwide income

- Pay social security tax (FICA & Medicare) unless you are in J-1 or F-1 status
- May claim all of your dependents
- May take the standard deduction or itemize deductions
- File form 1040 or one of its derivatives
- May not claim tax treaty benefits

**Taxation of Nonresidents:** If you are a nonresident, you

- Pay tax only on income earned in the United States
- Do not pay social security tax (FICA & Medicare) if you are in J-1 or F-1 status
- May claim only yourself as a personal exemption regardless of the number of accompanying dependents (citizens of Canada, Mexico, Japan, and Korea excepted)
- May not take a standard deduction
- File form 1040NR or 1040NR-EZ
- May claim tax treaty benefits if eligible

### **Taxation Income**

Visiting faculty, researchers and post-doctoral fellows, and others being paid by UNC Charlotte are not exempt from federal income tax unless a tax treaty benefit applies to them. Employees in administrative or “casual” (hourly) positions are subject to all federal income taxes as tax treaties do not apply to such positions.

### **W-4 Form**

Because the United States requires employers to withhold tax on wages earned by all employees, all employees must fill out a W-4 form before going on payroll. Based on projected earnings and the numbers of allowable exemptions, this form determines the amount of money withheld from one’s pay for the Internal Revenue Service (IRS) and the North Carolina State Department of Revenue. Except for citizens of Canada, Mexico, Japan and Korea, nonresidents for tax purposes may claim only one personal allowance (item 4) and *all nonresidents are required to leave item 6 blank: nonresidents may NOT claim exemption from withholding on the W-4*. Unless your entire income is specifically exempt from taxation by virtue of a tax treaty (see following section on the treaties), you must have tax withheld. You then claim a refund from the IRS for the portion of your income you believe is exempt based on your treaty.

### **W-2 and 1042S Forms**

In January everyone on payroll and subject to withholding the previous year receives a W-2 form, a statement of the amount of money withheld from total earnings for federal tax, social security taxes (FICA), and state taxes. The form is issued by every employer for whom you worked. Each W-2 has four identical sections, one to be submitted to the IRS with the federal tax return, one to be submitted to the state with the state tax return, one to be submitted for local taxes in those places where such taxes exist, and one to be retained by the employee.

Nonresidents with tax treaty claims receive a 1042S statement of income for the portion of income that is exempt.

### **Tax Treaties**

The United States has tax treaties with over 40 countries. Although there are certain basic similarities among them, the treaties vary in significant ways in terms of the benefits they offer, in terms of the types of income covered, the total amount of the exemption, and the number of years one can claim the benefit. *The university withholds tax on your earnings unless you make a claim for exemption by treaty.*

The Payroll Office has the full text of treaties for your reference available on CD-ROM. The staff does not, however, interpret the treaties for you; for a full analysis you must consult a tax accountant or your consulate.

Countries with tax treaties with the United States are listed below. *The existence of a tax treaty with your country does not automatically mean you do not have to pay taxes.*

Antilles/Aruba	Finland	Jamaica	Philippines
Australia	France	Japan	Poland
Austria	Germany	Korea (South)	Rumania
Barbados	Greece	Luxembourg	Russia
Belgium	Hungry	Malta	Slovak Republic
Canada	Iceland	Mexico	Spain
China (PRC)	India	Morocco	Sweden
Comwlth. Of Ind States	Indonesia	Netherlands	Switzerland
Cyprus	Ireland	New Zealand	Trinidad and Tobago
Denmark	Israel	Norway	Tunisia
Czech Republic	Italy	Pakistan	United Kingdom
Egypt			

### **Claiming Exemption from Taxes Based on a Tax Treaty**

Individuals who are sure they are eligible for treaty benefits must complete a claim form I-8233. Individuals are responsible for their own tax decisions. They are also responsible for notifying Payroll when their tax treaty benefit ends (in some cases, the benefits end after two years).

If you are unsure as to whether you are eligible for tax treaty benefits, you may consult with a tax attorney, the Payroll Office or ISSO.

### **Filing Tax Returns and Obtaining Refunds**

Most residents for tax purposes who have income from a source in the United States must file tax return form 1040 or one of its derivatives between February 1 and April 15 for preceding tax year. Non-residents for tax purposes file the form 1040NR or 1040NR-EZ. Forms will be available during that period from ISSO as well as access to a web-based tax filing program. In addition, the office sponsors a series of workshops with general information on how to file. We will not be able to give individual tax filing advice. However, the 1040NR, 1040NR-EZ, 1040, or 1040EZ is filed with Internal Revenue Service Center, Philadelphia, PA 19255.

In many cases, taxpayers are due a refund because more money was withheld from their pay than they owe in taxes. If a refund is due, a check is sent a few months after the tax return is filed. In some cases, more tax may be due; in this case the taxpayer must send the IRS a check for the tax due with the return by the April 15 deadline.

It is not possible to receive a refund of money withheld without filing a return. Individuals who fail to file when tax is owed may later be required to pay fines, penalties, and interest charges in addition the taxes. Do not assume because people you know did not pay tax in the past that you also do not have to pay taxes – the tax laws underwent substantial change in 1987 and the IRS computers are very sophisticated.

### **North Carolina State Taxes**

State tax laws are considerably simpler than federal laws, but it is usually the case that if you must pay federal taxes you must also pay state taxes. In some cases you may have to pay state tax even when you do not pay federal tax. **Information on North Carolina State tax regulations is available from the Taxpayer Information Office at 500 W. Trade Street in Charlotte or phone them at 704-342-6121.** Forms are available at the UNC Charlotte or any public library in Charlotte and ISSO. State income tax returns are filed at the same time as your federal return.

### **Social Security Tax & Medicare**

The United States national retirement and disability insurance plan is known as Social Security. With very few exceptions all people who work in this country are required to pay into the system: **those in H-1B, J-2 and L-1 status must pay social security tax; J-1s and F-1s who are nonresidents for tax purposes are not required to have social security payments withheld from their pay.** When social security tax is withheld, it appears on the paycheck stub as “FICA,” (Federal Insurance Compensation Act), which is the name of the social security legislation passed by the U.S. Congress.

Medicare is medical care insurance benefits paid for by the federal government for people who qualify. The same tax obligation applies to Medicare as to Social Security.

**Note:** Be sure to check your first paycheck to see if taxes have or have not been withheld. Contact the University Payroll Office if you have any questions at 72217.

### **Social Security Number and Card**

Everyone who has earnings in the United States must obtain a social security number, the number used by the U.S. government to identify wage earners for tax purposes. The number is printed on a light blue card, referred to as the social security card. This card must be presented to a prospective employer before an individual may be hired.

To apply for a social security card, take your passport and other immigration documents (DS-2019, I-94, I-797, as appropriate), along with an employment letter from the University, **to the Social Security Administration Office at 5800 Executive Center Drive in Charlotte.** Directions to the Social Security Administration Office and the application form for obtaining your social security card are available in the ISSO.

**North Carolina Identification Card** is issued by the Department of Motor Vehicles (DMV) to individuals who:

- Do not have a driver’s license
- Want another form of identification

You must present the following documents having the exact same spelling of your name: valid passport, valid I-20 or DS-2019, visa (can be expired), and proof of residency.

Website: <http://www.ncdot.org/dmv/>

Driver's License examining locations are located at:

8446 Hwy 29 (North Tryon) 704-399-8306

6016 Brookshire Blvd 704-535-2525

201-A W. Arrowwood Rd 704-455-9517

## **ITIN**

An ITIN can be applied for only if you or your dependent must have it for tax filing purposes and are not eligible for a Social Security Number.

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## **Immigration**



### *Government Agencies*

#### DHS – The Department of Homeland Security

- Writes regulations and develops policies to implement the regulations and establish the parameters, procedures, conditions, benefits, duties and restrictions of most non-resident visas
- Inspects non-residents when they apply for admission at a U.S. port of entry, and then admits them into the United States in appropriate visa status
- Adjudicates applications for certain benefits under the various visa categories
- Manages the Student and Exchange Visitor Information System (SEVIS) for J-1 and F-1 visa categories

#### SEVIS – Student and Exchange Visitor Information System

- SEVIS database receives, stores, and processes data submitted by schools for students and dependents (F-1 and F-2) and Exchange visitors and dependents (J-1 and J-2)

#### DOS – The Department of State

- Issues visas for all non-residents and J-1 at U.S. Consuls
- Creates and administers federal regulations and policies governing the Exchange Visitor Program

## **Staying “In Status”**

Like all nations, the United States has laws governing foreign nationals residing within its borders. You may be confused by the many forms, numbers, and deadlines, but if you understand and meet the following essential requirements, you will be able to maintain your legal status in the United States:

- Keep your passport valid at all times

- Apply for an extension of permission to remain in the United States at least one-two months before your authorized stay expires
- Report a change of address to the ISSO and your employing department within 10 days of your move
- Carry your passport and U.S. immigration documents with you when traveling
- Check with the ISSO to be sure your documents are in order before traveling abroad
- Complete all necessary procedures before taking employment at another school or transferring visa sponsorship
- Do not work without authorization from DHS or the ISSO as required
- Pay required income tax
- Before leaving the country for an extended period of time, obtain a Certificate of Compliance (“Sailing Permit”) from the Internal Revenue Service (IRS)
- Check with ISSO for the appropriate DHS office for various immigration processes

The address of the district office of the DHS office is 6130 Tyvola Centre Drive, Charlotte, NC 28217. Still, many immigration processes are done at the California Service Center.

Any time you have a pending application or a question regarding your immigration status see the staff in the ISSO before proceeding to contact the DHS directly.

### **Passport**

Your passport is your basic travel document, a formal permit from your government to travel abroad and return to your country. It is also your primary form of identification outside your home country.

Your passport must be valid at all times. It can be renewed at your embassy in Washington D.C. or other designated consular office. For precise information about procedures and fees, you must contact the agency directly. Addresses and telephone numbers of embassies in Washington D.C. are available at [www.state.gov/s/cpr/rls/fco/](http://www.state.gov/s/cpr/rls/fco/)

If you lose your passport, you must apply for a new one through your embassy in Washington, D.C. or appropriate consular office.

### **Visa vs. Authorized Stay**

Many people assume that when their visa stamp expires, they must get a new visa. This is generally not true; the following should explain the difference between the expiration of a visa and the expiration of authorized stay.

### **Visa**

The visa is issued and stamped in your passport by a U.S. consul outside the United States. The visa is required for entry to the United States, and indicates your designated visa category and states status, e.g., H-1B or J-1. The visa has an expiration date and may be valid for one, two, or an unlimited number of (“multiple”) of entries. Contact the U.S. Department of State <http://travel.state.gov/visa/> for all visa information.

It is not necessary to renew your H or J entry visa to remain in the United States; within the U.S. you need only renew, or extend, your authorization to stay (see next section on “Authorized Stay”). **Be aware, however, that if you travel abroad (other than to visit Canada, Mexico, or any of the islands adjacent to North America, for less than 30 days), AND if your entry visa**

**has expired, you must a new visa at a U.S. embassy or consulate outside the United States before reentering be issued.**

### **Authorized Stay: Arrival/Departure Record (Form I-94)**

U.S. Customs and Border Protection (CBP) maintains an Arrival/Departure Record (I-94) on all nonimmigrants. Your passport will be stamped at the port of entry. It indicates that admission to the United States has been granted for a specific period of time and for a specific purpose. You may obtain a printed copy of your I-94 at [www.cbp.gov/i94](http://www.cbp.gov/i94). A new I-94 record is created each time you reenter the U.S.

If you wish to stay beyond the date authorized by your I-94, you must apply for an extension of stay. At least 60 days before the end date, contact ISSO to determine your eligibility for an extension and the procedure for obtaining it.

### **Travel and Re-Entry**

If you travel outside the United States, be sure your documents are in order. You must have a passport valid for at least six months beyond your entry date, a valid visa for the status you are seeking and, depending on your visa type, the following additional documents for re-entry:

- H-1B** Form I-797 available from the ISSO; a letter from your department confirming your current appointment and salary. H-4 dependents should carry a similar letter from the department confirming the H-1B's employment as well as proof of relationship to the H-1B principle.
- J-1** A new DS-2019 or an unexpired DS-2019 endorsed within the last 12 months; financial documentation. J-2 dependents must carry their own DS-2019.
- F-1** I-20 endorsed within the last 12 months, or an entirely new I-20 form; financial documentation. F-2 dependents should carry their own I-20.

You may generally travel to and return from Canada, Mexico and adjacent islands on an expired visa if the travel is **for less than 30 days**. Return travel from any other country requires a valid visa.

**Note:** In the case of some countries, Mexico will not issue a visa if your U.S. visa has expired. We urge you not to attempt any travel outside the United States without checking with the ISSO to ensure that all necessary arrangements have been made.

### **Visits to Canada of Less than 30 Days' Duration**

Citizens of certain countries may visit Canada from the U.S. for less than 30 days without first obtaining a Canadian entry visa; this is, of course, conditional upon possession of proper U.S. immigration documents for reentry to this country. The list of those countries whose citizens do not need visas for brief travel to Canada changes frequently. Before making plans to travel to Canada, it is best to call the Canadian consulate in New York (212-586-2400) to check if you need a visa or access the Canadian consul on-line. The address of the Canadian consulate in New York is: 1251 Avenue of the Americas, New York, NY, 10020.

When applying for an entry visa to Canada you must take or mail to the Canadian consulate your passport, I-94 and the following document or documents, as appropriate to your immigration status: letter from department confirming current employment (for H-1B); I-20 (for F-1s); DS-2019 form (J-1s). You will also need to bring these documents with you when you travel to and from Canada.

Unless you fall into one of the “exception” categories below, you do not need a valid U.S. visa to return to the United States in a status previously authorized by DHS/USCIS, nor will you surrender your I-94 when you cross into Canada.

**Exceptions:**

- Individuals with the designation 212 (d)(3)(A)(28) on the visa need to see the international advisor at least 30 days before the intended trip for instructions on notifying to U.S. Department of State of the approximate date you intend to apply for a new visa at a U.S. consulate in Canada.
- Citizens of certain countries with whom the U.S. does not have friendly relations may be required to obtain a new visa before reentering from Canada. In such cases, it may be risky to travel to Canada; you should speak with the staff of the ISSO before making travel plans.

**Visits to Mexico and “Contiguous Islands”**

Similar procedures apply when traveling to Mexico and “Contiguous Islands” as are outlined for travel to Canada. Contact the ISSO for more information and addresses.

**Departure Requirements at End of Stay**

When you plan to leave the University at the end of your stay, other than, not for brief visits overseas, you must notify the ISSO of your forwarding address and date and method of departure. If you are leaving the United States, you must also obtain a “sailing permit” from the Internal Revenue Service (see “Taxes” in the “Money Matters” section of this handbook.)

**H-1B Visa Information (Including H-4 Dependents)**

Holders of H-1B status are professional temporary employees, i.e., they hold appointment which, at the time of obtaining H-1B status, is, or was temporary in nature. Tenure-track assistant professors, for example, may eventually become permanent employees, but often begin at UNC Charlotte with one to three year appointments.

**Authorized Employment**

*The H-1B is employer-specific.* H-1B status permits you to be employed only by the organization or organizations which have a petition approved by DHS.

H-1B authorization effectively has two parts: the first is your employer’s authorization to employ you in H-1B status; the second is your own approval for H-1B status. If overseas, you obtain your approval after getting a visa at a U.S. consulate or embassy and then pass through an immigration inspection upon entering the U.S.; if you are in the U.S., you obtain H-1B status from DHS/USCIS. In either case, your approval has an ending date which is noted on the I-797 and Form I-94. It is your personal responsibility to keep track of this date and, if you wish to extend your H-1B status, to contact your supervisor two to three months prior to your authorized expiration date so that he or she can request the ISSO to process your extension application.

*There is a six year maximum stay in H-1B status. This includes any time spent in H-1B status with other employers. Only if you are out of the U.S. continuously for one year or more you are eligible for six additional years.*

### **Traveling outside the United States**

At least eight weeks before traveling outside the U.S., H-1B employees should check with the ISSO to be sure all paperwork is in proper order for reentry. Should you need to obtain a new visa (if your current one has expired, or if you changed to H-1B from another status within the U.S.), you will need to carry the original I-797 Form and related documents from the ISSO with you.

### **Dependents**

Dependents of H-1Bs carry the H-4 visa designation. *Dependents may go to school but under no circumstances are individuals in H-4 status permitted employment in the United States.*

## **J-1 Visa Information (Including J-2 Dependents)**

### **Definition**

By legal definition, a J-1 exchange visitor is "...an alien having a residence in a foreign country which he/she has no intention of abandoning, who is a bona fide student, teacher, professor, research specialist or leader in a field of specialized knowledge or skill..." who is coming temporarily as a participant in a designated Exchange Program. UNC Charlotte has been approved by DHS as a designated Exchange Program Sponsor. Such sponsorship implies adherence to regulations and not only places the visitor in jeopardy of immigration sanctions, but may also subject the University to possible decertification. Most J-1 employees, post-doctoral fellows and visiting researchers will be at UNC Charlotte on DS 2019 issued by UNC Charlotte and most will be in the "professor/research scholar" category. *This category limits you to a maximum stay of five years.*

**Note:** In a few cases, those in J-1 status are here under sponsorship from another organization and/or are in the "student" category. If this is your case, discuss with the international advisor the regulations which govern your stay, since the information which follows applies primarily to J-1s in the "professor/researcher" category under UNC Charlotte's DS 2019 sponsorship and may not be applicable to your situation.

### **Employment**

The J-1 professor/researcher on UNC Charlotte's DS-2019 is authorized to be employed only by UNC Charlotte and regulations do not permit program sponsors to actually authorize off-campus employment. It is not legal to be a professor/researcher at UNC Charlotte and to concurrently perform additional professionally-related services off-campus unless such services are occasional *and* part-time, and you have received written confirmation from the program sponsor in the ISSO that this is the case.

In order to obtain such confirmation, for occasional lectures and/or research, you must present the ISSO a letter from the chairperson of your department at UNC Charlotte and a second letter from your proposed off-campus employer. Both letters must certify that the services you will perform will be occasional and part-time, will be secondary to your objectives at UNC Charlotte and will not adversely affect your work at UNC Charlotte. The letter from your proposed off-

campus employer must also state the number of hours you will be expected to work and a brief description of the services you will perform. If, based on these letters, it is determined that performance of the services off-campus is in keeping with the regulations governing the Exchange Visitor Program, you will be given written confirmation of this fact, i.e. you will not be given "employment authorization" per se. It is then for the proposed off-campus employer to decide whether or not to accept this written confirmation as evidence of your eligibility to work.

### **Limits of Employment**

The J-1 professor/researcher on UNC Charlotte's DS-2019 is limited to employment at UNC Charlotte in teaching and/or research directly related to his/her program objectives (as stated on the DS-2019). Employment for reasons of financial necessity is not permitted to J-1 professors or researchers, as the US government expects individuals in this J-1 category to be adequately funded.

### **Program Transfer**

If you plan to be employed as a J-1 visiting professor/researcher elsewhere in the United States after you leave UNC Charlotte, you must obtain a DS-2019 from the new program sponsor and complete program transfer procedures.

### **Maintaining Status**

When an exchange visitor is admitted to the U.S., he/she is issued Form I-94 (Arrival/Departure Record), marked "D/S" 'for duration of status' is issued. Exchange visitors may remain in the U.S. as long as they maintain J-1 status up until the ending date on the DS-2019 plus 30 days. The D/S notation means that DHS considers exchange visitors to be in status as long as their form DS-2019 is valid and they engage only in activities permitted by the form DS-2019.

### **Extension of Stay**

Contact ISSO about extensions of stay at least 30 days prior to the expiration of the DS/2019. This involves the issuance of another DS-2019 and a 'notification' process with USCIS. Extensions may be requested within the overall program limits of the various J-1 categories.

**Note:** J-2 dependents are granted D/S and have their stay automatically extended at the time of the processing of the J-1 papers.

### **Change of Category**

Exchange visitor regulations do not permit a change of category, e.g. from researcher to student, within the U.S., as this constitutes a change in program objectives. If the J-1 visitor is not subject to the two-year home residency requirement, he/she may be eligible to return home, apply for a new visa in the new J-1 category, and return to the U.S. to begin the new program.

An important note about the two-year home country residence requirement: An exchange visitor will be subject to this requirement if:

- 1) The program stay is financed in whole or in part, directly or indirectly, by the United States government, the home government, or an international organization for the purpose of international exchange.

- 2) The government of the visitor's country of citizenship or permanent residence has filed a job skills list with the U.S. Department of State. (This list specifies skills or knowledge considered to be in short supply in that country.)

A visitor who is subject to this two-year requirement may *not* change to another immigration status without first fulfilling the requirement. Under some circumstances, a visitor may apply for a waiver of this requirement; however such waivers are difficult to obtain. Further, the waiver process must be initiated well before the expiration of the visitor's permission to stay in the U.S., often one and a half years before. Contact ISSO for further details.

### **Dependents (J-2)**

The J-2 dependent is subject to any limitations of the J-1 primary. Therefore, if the J-1 principle is subject to the two-year home residency requirement, his or her dependents are also. J-2s are eligible to apply to the USCIS for employment authorization. If it can be demonstrated that the J-2 income will not go to help support the J-1 primary at all, but that there is a true economic necessity for additional money to pay for J-2 expenses, the application is likely to be approved. Applications are available at the ISSO.

## **TN Status (For Certain Canadians and Mexicans Only)**

**The TN Classification** is for Canadian or Mexican citizens who seek temporary admission to engage in business at a professional level under the North American Free Trade Agreement (NAFTA). **TD is for the dependent of a TN alien.** Professional level business activity means an undertaking that requires at least a baccalaureate degree, or appropriate credentials showing status as a professional. A separate procedure is provided for each nationality. *Contact ISSO for more procedural details.*

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## **Cultural Adjustment**



### **Introduction**

While some international faculty and scholars come to UNC Charlotte after many years' experience with life in the United States, many arrive in Charlotte directly from overseas, having little or no direct previous experience in this country. This section is intended to guide those who are unfamiliar with American life and its values system, and to address briefly the issue of "culture shock".

## **Culture Shock**

"Culture Shock" is the feeling of disorientation or confusion that occurs when a person leaves a familiar place and moves to any unfamiliar one.

People experience culture shock in varying degrees. Those who are most affected by it tend to become nervous and unusually tired. They want to sleep a lot and write many letters home. They may feel frustrated and hostile toward their host country. They may get excessively angry about minor irritations. It is not unusual for them to become very dependent on fellow nationals in the new country. All of these feelings make it difficult to deal with the residents of the host country and to use their language. However, these feelings usually pass, and the person becomes adjusted to the new environment. Different people react differently to culture shock. Some become depressed; while others are stimulated by the experiences open to them.

## **Cultural Characteristics of Americans**

Like any other nationality group, Americans vary from individual to individual; it is possible, however, to mention certain characteristics which, in general, describe attitudes and practices common among Americans. Keep in mind that the following remarks are generalizations and that there are many groups in America whose values differ radically.

### **Individualism**

Americans generally believe that the ideal person is an autonomous, self-reliant individual. Most Americans see themselves as separate individuals, not as representatives of a family, community or other group. They dislike being dependent on other people or having others dependent on them. Some people from other countries view this attitude as selfishness; others view it as a healthy freedom from the constraints of ties to family, clan, or social class.

### **Informality**

Americans are taught that all people are created equal. They treat each other in very informal ways, for example, even in the presence of great differences in age or social standing. From the point of view of some people from other cultures, this kind of behavior reflects "lack of respect." From the point of view of others, it reflects a happy lack of concern for the social ritual. Americans, as a rule, usually think nothing about starting casual conversation with a complete stranger, this is usually meant as a sign of friendliness. Should strangers smile at you, it is a sign of welcome and acknowledgement of your presence. It is not necessarily an invitation to speak, nor is it a sign of insincerity when they do not acknowledge your presence. Americans also "talk" with their hands, often touching another person to make a point, to express sympathy, or to be friendly, even in casual conversation with people not well known to them.

### **Time Consciousness**

Americans place considerable value on punctuality. Since Americans are so time conscious, the pace of life may at first seem very rushed. In the United States, people make a great effort to arrive on time. It is often considered impolite to arrive even a few minutes late. If you are unable to keep an appointment, it is expected that you call the person you are meeting.

### **Friendship**

Friendships among Americans tend to be shorter and less intense than those among people from many other cultures. Americans tend to compartmentalize their friendships, having their friends at work, friends at school, and so on. The result of this is sometimes viewed by foreigners as an

inability to have friends. Other times it is seen as a normal way to retain personal happiness in a mobile, ever-changing society. Some American ideas about friendship might be different from your own. Basically, your honesty about what you feel about any one friend promotes an open communication between the two of you, leading to a better understanding of your respective positions.

### **Tipping**

Rarely are service charges included in a bill. Waiters, waitresses, and taxicab drivers should be tipped approximately 15 to 20 percent of the total bill or fare. Porters and bellboys should be given one or two dollars for carrying luggage, but desk clerks are not tipped. Barbers, hairdressers, delivery persons (but not U.S. postal workers), and parking lot attendants are tipped one or two dollars. No tips are given to theater ushers, gas station attendants, airline employees, bus drivers, receptionists, or store clerks. Never attempt to tip customs officials, policemen, or other government employees.

## **About Charlotte and Its Environs**



### **Introduction to Charlotte**

Charlotte offers many options in entertainment: Sports, theater, music, recreation, restaurants, festivals, and shopping. But first, let us tell you a little bit about our history, our people, our climate, and where we are located on the map.

### **History**

About 250 years ago our Scots-Irish ancestors, traveling the Great Wagon Road from Philadelphia, stopped at the crossroads of two old Native American trading paths east of the Catawba River and there they built a settlement. As their friends and neighbors joined them, the community grew to several hundred residents. In 1768, the town was incorporated and named in honor of the wife of King George III, the reigning English monarch. Local citizens honored Queen Charlotte again when they named their new county Mecklenburg after her German homeland. The discovery of a 17-pound gold nugget in 1799 set in motion a proliferation of mines and an influx of prospectors, followed by the establishment of a branch of the U. S. Mint in 1837. The boom was short-lived, however, as "strike-it-richers" and other opportunists followed the call to California a few years later. After gold's boom and bust, the cotton industry brought prosperity to the region, and with it came the railroads, later supplanted by the interstate highway system and our modern-day airport.

## Population

As the center of the nation's fifth largest urban region, we are considered one of the South's and one of the Nation's premier cities. Approximately one million people reside within our borders.

## Location

Our location in the sunny, moderate Central region of the "Tar Heel" state gives you unlimited accessibility. Interstates 77 and 85 intersect in Charlotte and link the city with the Great Lakes region, New England, and Florida. Interstate 40 runs coast-to-coast across the United States and is only an hour north of Charlotte. A two-hour journey to the west takes you to the beautiful Blue Ridge Mountains; a three-and-a-half trip to the east, to Atlantic beaches. And within an hour's drive east of the city are some of the world's best golf courses.

## Charlotte "Fast" Facts - Charlotte has:

- 23rd largest school system
- Nation's number one pro-business attitude (Fortune Magazine)
- 643 Airline flights daily
- 8<sup>th</sup> most active airport in the country in total operations
- \$13.2 billion in retail sales
- Nation's 2<sup>nd</sup> largest banking center
- The Coca-Cola 600 NASCAR Race (3<sup>rd</sup> largest attended sporting event in the U. S.)
- Charlotte Bobcats NBA Team (basketball)
- Carolina Panthers NFL Team (football)
- 6<sup>th</sup> largest trading area in the U. S.
- 6<sup>th</sup> largest wholesale center in the U. S.
- 5<sup>th</sup> largest urban region
- 19<sup>th</sup> largest U.S.city
- The Arts and Science Council provides \$14 million to support 150 cultural organizations
- Population forecast to grow 30% to 1.22 million by 2020
- **UNC Charlotte's International Festival** is an outdoor cultural festival with food, music, dance and more. It takes place on the UNC Charlotte campus in the fall of each year.
- **Southern Christmas Show** is an annual event held at the Merchandise Mart which showcases Christmas – theme inspired cooking, crafts, decorating and gift ideas. It is usually held in the middle of November.
- **Festival in the Park** is an annual outdoor festival held in Freedom Park designed to promote and stimulate interest in the arts. It is usually held in late September.

Additionally, Charlotte hosts several annual international cultural festivals that celebrate the arts and crafts, culture, and food of an ethnic group in the community:

- Vietnamese New Year, February
- Chinese New Year's Festival, February
- Austrian Fasching Ball, February
- St. Patrick's Day Irish Festival, March
- Festival of India, April
- Cambodian New Year's Festival, April
- Laotian New year's Festival, April
- Asian Festival, May
- Filipino Festival, May

- Bastille Day, July
- Charlotte Caribbean Festival, August
- Bon Odori Japanese Festival, August
- Yiassou Greek Festival, September
- Latin American Festival, October

