

# Academic Visitor Program

## Step 3 Checklist: Centralized Invitation Review and Agreement Processing

### Required Agreements and Other Documents for Category 2 and 3 Academic Visitors

The host department provides the Invitation Letter as part of the Visitor's MyEC record submission. The Office of Trade Compliance sources the Invitation Letter and the relevant visitor agreements to the Academic Visitor for signature after the MyEC record is approved.

Links to the relevant section on the [Academic Visitor](#) website are included in the first column under Document.

#### Non-CMU Visitors

<u>Document</u>	<u>Responsible Office(s)</u>
<input type="checkbox"/> <a href="#">Formal Invitation Letter</a>	Office of Trade Compliance/Host Department
<input type="checkbox"/> <a href="#">Visitor Participation Agreement</a>	Office of Trade Compliance
<input type="checkbox"/> <a href="#">Laboratory Use Addendum</a> (Category 3 Laboratory Activities)	Office of Trade Compliance
<input type="checkbox"/> <a href="#">Clinical Space Addendum</a> (Category 3 Clinical Activities)	Office of Trade Compliance

#### CMU Visitors

<u>Document</u>	<u>Responsible Office(s)</u>
<input type="checkbox"/> <a href="#">Formal Invitation Letter</a>	Office of Trade Compliance/Host Department
<input type="checkbox"/> <a href="#">CMU-Pitt Master Agreement</a>	Office of Trade Compliance

#### **Recommended Information To Include in an Invitation Letter\***

- Names of host department/school and host faculty member
- Dates and duration of visit
- Detailed description of the research/scholarship and/or any other activities to be performed
- A statement regarding responsibility for travel and daily living costs related to visit
- An appropriate disclaimer for Visitors to the Schools of the Health Sciences regarding hands-on clinical or patient-related activity
- An appropriate disclaimer for Visitors regarding required training
- A statement reiterating the requirement that a visitor participation agreement and any required addenda be signed.

\* An up-to-date [template Invitation Letter](#) is located on the [Academic Visitor](#) website.

#### **Related Information**

See the [Academic Visitor](#) website, specifically [Step 3: Centralized Invitation Review and Agreement Processing](#), for additional information regarding Visitor agreement documents and processing.

Contact the [Visitor Liaison](#) with any questions related to these procedures.