

FULBRIGHT





June 16, 2016

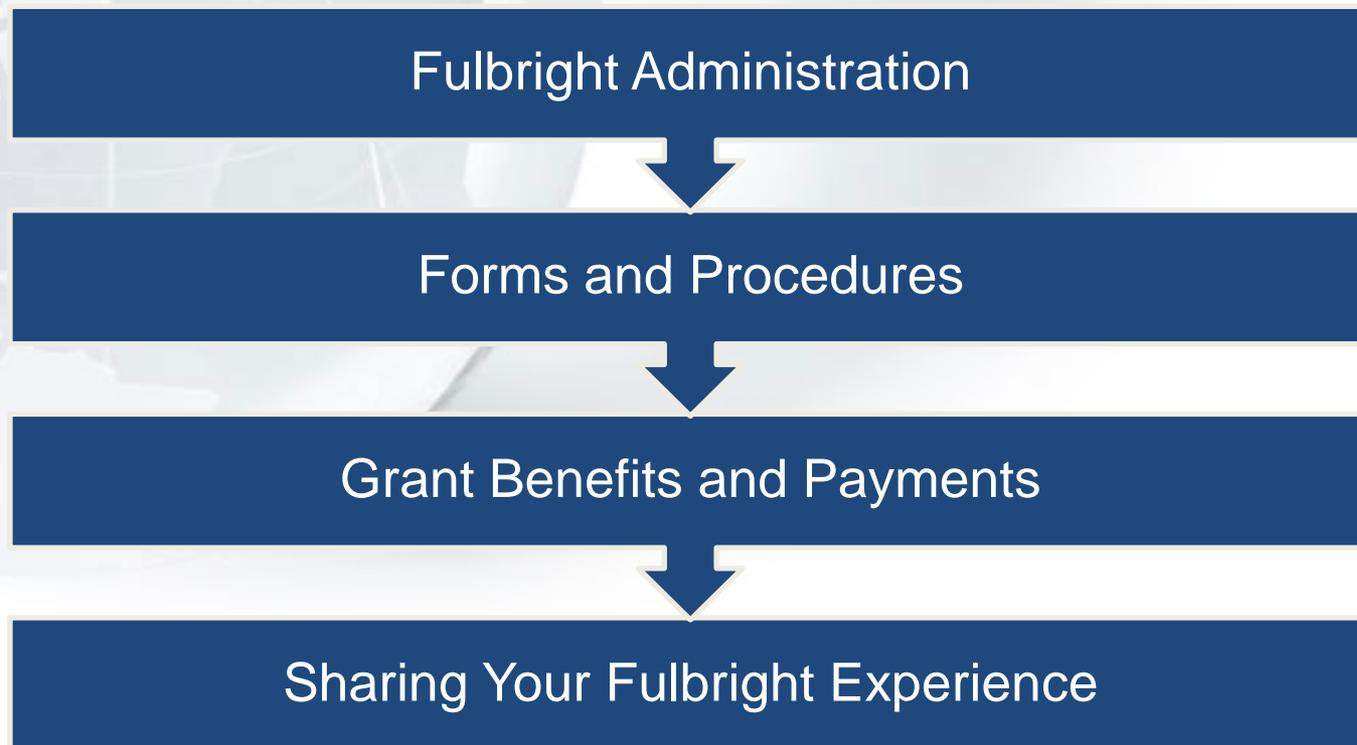
WHA Pre-Departure Orientation IIE/CIES Administration

**HILARY HARTLEY, REGIONAL LEAD
MARIA GAHAN, PROGRAM OFFICER**

WESTHEM@IIE.ORG

**INSTITUTE OF INTERNATIONAL EDUCATION
COUNCIL FOR INTERNATIONAL EXCHANGE OF SCHOLARS**

Overview of Presentation



Sponsored by the U.S. Department of State,
Bureau of Educational and Cultural Affairs

INSTITUTE OF
INTERNATIONAL
EDUCATION

 CIES
Council for International
Exchange of Scholars



Roles: ECA

The U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA)

- Oversees educational, cultural and informational programs for the U.S. government
- Sets operating policies based on regulations provided by the J. William Fulbright Foreign Scholarship Board (FFSB)
- Determines Fulbright Student and Scholar program budgets
- Establishes annual allowance rates and policies
- Receives and approves extension and renewal requests





Roles: CIES

The Council for International Exchange of Scholars (CIES) is a division of the Institute of International Education (IIE)

- Provides program publicity, outreach and information to applicants
- Manages applications and administers peer review
- Prepares grant materials based on ECA allowances and policies
- Processes grant payments
- Amends and renews grants per ECA approval
- Distributes and receives interim and final reports





Roles: Public Affairs Section, U.S. Embassy

- Builds and maintains relationships with host universities and local government partners
- Provides ECA with cost information to establish appropriate allowance rates
- Manages placement and affiliation processes
- Serves as primary point of contact while in country



Documents due to CIES before Departure



Signed grant document



Medical History and Examination Form



Grant Payment Deposits Form



Travel itinerary



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Grant Terms and Conditions

- Report changes of grant dates/length
- Cannot postpone grant to subsequent academic year
- Inform CIES of all other fellowships, grants, salary, home institution support
- You may take two weeks of leave from grant





Medical Form

Submit form to CIES at least 8 weeks before departure (via Grantee Portal)

CIES will check for completeness and forward to U.S. Department of State

CIES will inform you when you receive medical clearance (2 week process)

Keep copy of form with you during grant in case you need to seek medical treatment





Medical Form: Common Mistakes

- Make sure both you and your physician sign the form on page 8
- TB test and vaccinations are not required for CIES clearance*
- Ensure physician checks/completes all fields on pages 4-8
- Examination should not take place more than 6 months before grant start
- Dependents do not need to receive CIES medical clearance*
- *Wait to receive clearance and CIES approval of itinerary before booking travel*

*Some countries require foreign visitors to carry an International Certificate of Vaccination





Grant Payment Deposits Form

- Complete bank account information including *routing number* and *account number*
- Upload form and voided check together as single PDF
- This form allows CIES to pay grantees via electronic funds transfer

John Doe 2400
 123 Your Street
 Yourtown, AA 12345

PAY TO THE ORDER OF _____

DOLLARS

Your Bank
 Anywhere US

MEMO _____

05278 6724301068 2400

Routing Number Account Number Check Number





Travel Information

- Travel must be booked with an American carrier in accordance with the *Fly America Act* or the *Open Skies Agreement*
 - Upload proposed itineraries for you and your accompanying dependent(s) to the Grantee Portal for review and approval *before* purchasing tickets
 - Once approved and purchased, upload accompanying travel receipts to the “My Documents” section of the Grantee Portal
- * **Important:** Inform your host institution, U.S. Embassy contact and CIES if you plan to change your travel itinerary and any time you plan to leave the country.





Grantee Portal

Log-in information, checklist and instructions sent to you by email

The screenshot shows the top navigation bar of the Grantee Portal. The navigation items are: My Details, My Documents, My Forms & Resources, Travel, and Log Out. Below each item is a blue callout box with an upward-pointing arrow and a description of the function.

Navigation Item	Function
My Details	View personal information, change password, add emergency contacts
My Documents	Upload documents, view approval status
My Forms & Resources	Link to Grantee Webpage
Travel	Enter proposed itineraries
Log Out	Log out of Portal





Grantee Portal Check List

- ✓ Review personal information in “My Details” tab to ensure accuracy
- ✓ Add **two emergency contacts** in “My Details” tab (“Addresses” subtab)
- ✓ Upload required documents to “My Documents” tab
 - Signed grant document
 - Medical History and Examination Form
 - Grant Payments Deposit form
- ✓ Enter proposed travel itineraries for you and your dependents in “Travel” tab
- ✓ Once purchased, upload travel receipts to “My Documents” tab as “Travel Itinerary”



Grantee Webpage

U.S. Scholar Guide Online: www.cies.org/grantees/
Password: CIES_grantee!

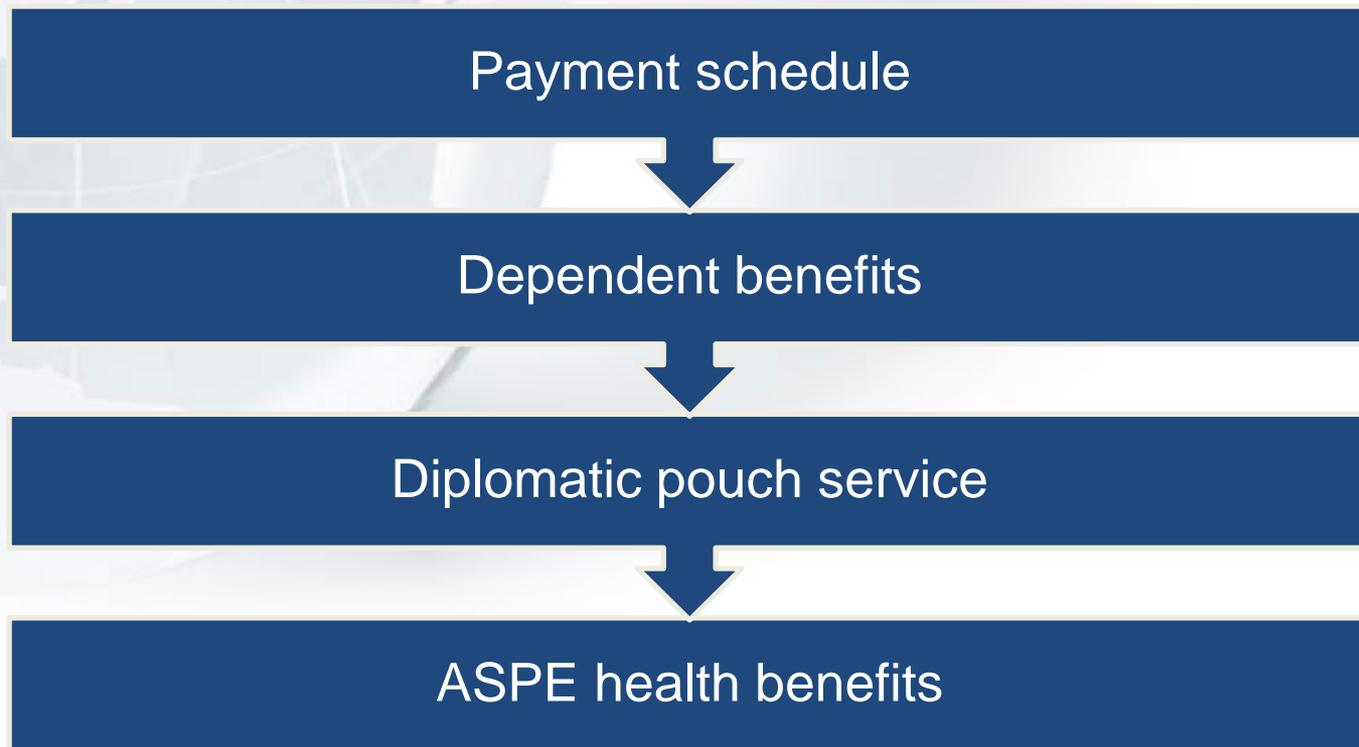
- Required forms
- ASPE information
- Tax information
- Online Interim and Final Reports
- Sample press release



The screenshot shows the Fulbright Scholar Program website. At the top, there is a navigation bar with "Resources for:" followed by "Applicants" and "Grantees" (which is highlighted). Below this is the Fulbright logo and the text "FULBRIGHT SCHOLAR PROGRAM" and "A program of the United States Department of State, Bureau of Educational and Cultural Affairs". A secondary navigation bar includes "Home", "About Us", "Programs", and "News". The main content area shows a breadcrumb trail "Home > Resources for > Grantees" and a heading "Grantees". Underneath, there is a sub-heading "U.S. Scholar Grantees" and a paragraph stating that the section is restricted to Fulbright U.S. Scholar Grantees only. At the bottom of the content area, there is a button labeled "U.S. Scholar Login »".



Grant Benefits and Payments



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Grant Benefits

Monthly Payments	One-Time Payments
<ul style="list-style-type: none">• Base stipend• Living allowance• Housing allowance• Salary supplement (for lecturers)	<ul style="list-style-type: none">• Travel and relocation• Book/educational materials <p style="text-align: center;">OR</p> <ul style="list-style-type: none">• Research allowance





Book Allowance/Educational Materials

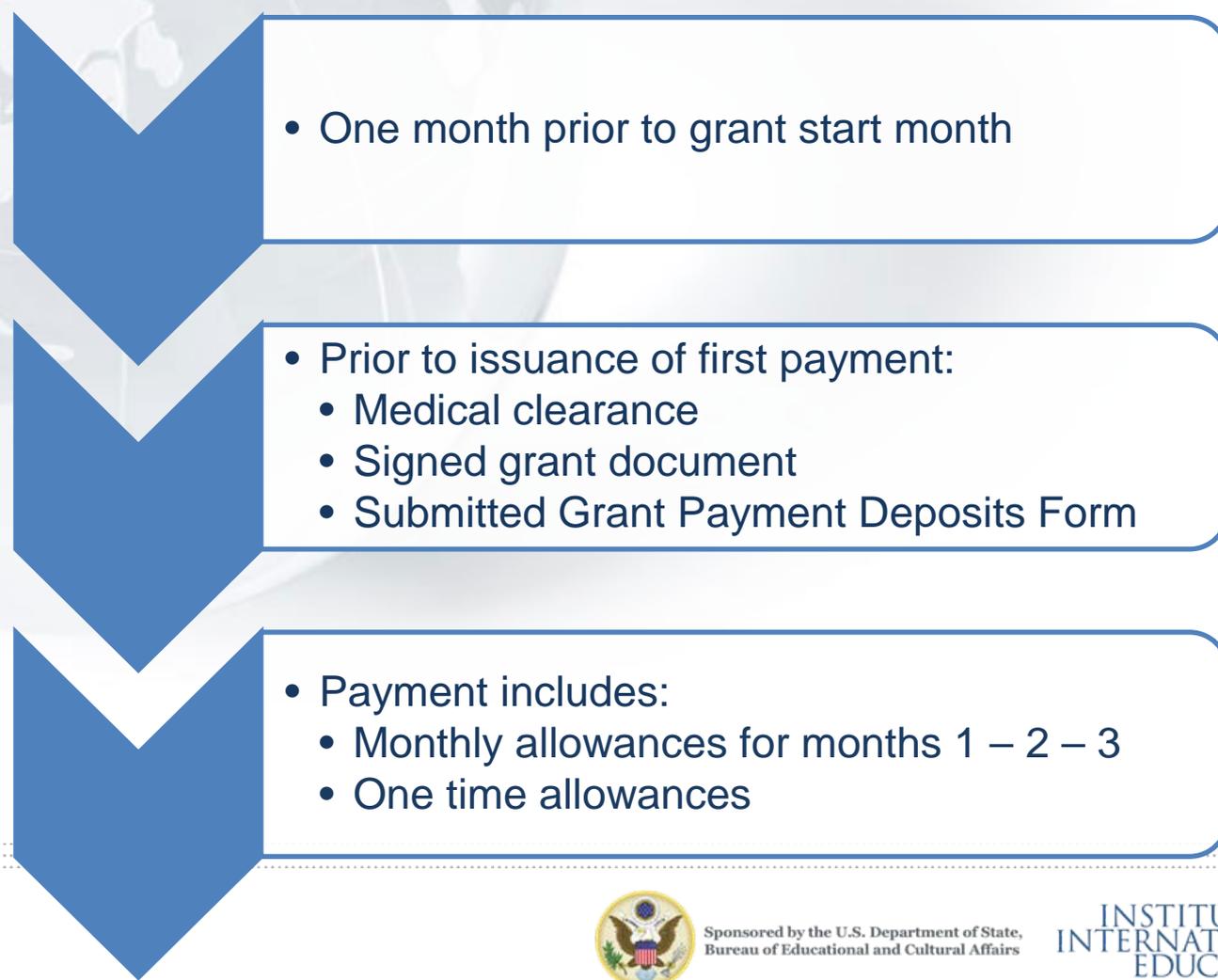
- Teaching or teaching/research grantees receive a book allowance; research-only receive a research allowance
- Use diplomatic pouch and excess baggage allowance for shipping
- For course materials and curriculum development (*books, photocopies, journal and on-line subscriptions, etc.*)
- Materials should be donated as a long-term resources for host university library and/or academic department





Payment Schedule

Payment 1:



Payment Schedule

Payment 2

- End of third month
- Includes monthly allowances for months 4-5-6

Payment 3

- End of sixth month
- Includes monthly allowances for months 7-8-9

****Number of payments depends on grant length***





Accompanying Dependents

- Defined as:
 - Spouse
 - Same-sex dependent partner
 - Child under 21 incapable of self-support
 - Other relative incapable of self-support
- Must accompany you for 80% of your total grant period
- Affect your grant benefits for travel, housing, and subsistence
- If your dependents change, notify CIES



Diplomatic Pouch Service

Educational Materials

- One-time shipment of educational materials to host U.S. Embassy or Consulate
- Maximum limits apply
- Service cannot be used to ship materials back to the U.S.
- Shipment addressed to:

Cultural Affairs Officer

Post-specific street address

Department of State

Washington, DC 20521-xxxx (Post+4 ZIP)





ASPE Health Benefits

- Limited coverage for only you, the grantee
- Serves as supplemental coverage
- Maintain your health insurance policy and research international coverage
- Claim Form, Brochure and Overview on Grantee Web Page
- ID card can be downloaded after your travel is approved
- Detailed information on ASPE coverage can be found at <https://myplan.sevencorners.com>





Health Coverage for Dependents

- Check your current insurance for coverage outside the U.S.
- Contact the company of your choice to purchase insurance or supplementary insurance
- Refer to **Scholar Guide** for additional resources



Taxes

- No withholding is made on grant, no W-2, no 1099 forms
- Relevant IRS Publications:
 - 970 Tax Benefits for Education
 - 54 Tax Guide for U.S. Citizens and Resident Aliens Abroad
- Contact IRS International Division: (267) 941-1000

<http://www.irs.gov>

and

<http://www.irs.gov/Individuals/International-Taxpayers/Fulbright-Grants>



Sharing your Story



Interim and final report requirements



Utilizing social media and the Source



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Reports

Interim Report



- For grants six months or more, submit via Grantee Web Page at grant mid-point

Final Report



- Submit online to CIES at end of all grants
- Notification to complete final report will be e-mailed to you one month before end of grant
- Completion of final report is required





Sharing Your Fulbright Experience

- Upload 3-5 photos of your Fulbright to [our online database](#).
- Use hashtags when sharing photos, and memories of your Fulbright experience on social media
- Submit a post to the [Fulbright Scholar Blog](#). View blog guidelines [here](#)
- Follow us on [Twitter](#) (@FulbrightSchlr), [Facebook](#), and [Instagram](#) to find out more about program updates and scholar stories



Your Name*

Your Email*

Your Program*

Caption This Photo*
Please provide a descriptive caption for your photo--the where, who, what and why: "John Doe and Mary Smith leading an art workshop for Buenos Aires youth."

Additional Details
Add hashtags or other notes on your photo: "Friends for the bus ride and beyond! #argentina #arts #youth #muralarts"

[See our guidelines for helpful tips](#)

Taken When?

Taken Where?
Include country, region, and city. Please be specific!

Photo Credit

Upload Files
Drop files here or

Check this box to accept the [terms and conditions](#) and continue upload*





To Do Checklist

- Complete and upload medical and Grantee Payment Deposits Form to the Grantee Portal
- Complete and upload signed grant to Grantee Portal, once it is available
- Apply for your visa/research permit, if applicable
- Request approval for your proposed travel itinerary through the Grantee Portal
- Once purchased, upload travel receipts to the Grantee Portal
- Coordinate/discuss arrival with U.S. Embassy
- Notify CIES if your grant details, contact information or bank information changes





Contact Information



Have questions about your grant?

Hilary Hartley, Maria Gahan and Hilary Price

westhem@iie.org



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