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During your stay in the United States, CIES will be available to assist you whenever possible. A list of CIES staff members may be found on the website at www.cies.org/vsstaff.htm. If you have any questions regarding program policies, please contact your CIES staff member or explore the visiting grantee website further.

Per USCIS regulations, you are required to notify CIES of the following circumstances in a timely manner:

- Your dependents’ arrival in the United States,
- Change in residential or mailing address,
- Major changes in your personal status such as marriage, divorce or the birth of a child,
- Any international travel, and
- Plans for departure from the United States.

You must also inform CIES of:

- Feedback on the progress of your program,
- Any important problems with your research or lecturing program,
- Health problems, and
- Any legal issues you may encounter while on your grant.

You must apply for approval from the U.S. Department of State through CIES in advance for the following:

- Employment and honoraria (Section 21),
- Extension of stay (Part V: Section 27), and
- Transfer of sponsorship (Part V: Section 27).

Additionally, please share with CIES:

- Special presentations you make to university or community groups,
- Attendance at conferences related to your program, and
- Newspaper clippings, newsletters, websites, blogs and photographs related to your grant.

For information and advice about academic and campus matters, consult your faculty associate and your host institution’s office of international programs.

20. Professional and Personal Enrichment Activities

CIES encourages you to take advantage of opportunities to visit colleges and universities other than your host institution while you are in the United States. You may also be interested in attending a professional meeting or conference during your stay in the United States.
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On behalf of the U.S. Department of State, CIES implements a number of enrichment activities throughout the year in a number of locations throughout the United States. You are strongly encouraged to visit http://www.cies.org/enrichment/ for additional information.

Scholars hosted at institutions outside major metropolitan areas have the opportunity to apply to attend one of three visiting scholar seminars scheduled throughout the academic year. Seminars include interactive discussions, community service projects and local cultural activities designed to introduce the Fulbright Visiting Scholars to different aspects of the topics. Through local experts (such as public, private and/or non-profit leaders) and members of the academic community, the seminar presents different perspectives on the selected topic. Through community outreach activities and discussions, Fulbright Visiting Scholars learn how the selected topic impacts communities in the United States (specifically the host city) and explore its impact on their own home countries.


Occasional Lecturer Fund

On behalf of the U.S. Department of State, CIES provides travel awards through the Fulbright Occasional Lecturer Fund (OLF) to enable Fulbright Visiting Scholars who are presently in the United States for grants longer than three months to accept guest lecturing invitations at U.S. colleges and universities. Colleges and universities are encouraged to invite visiting scholars for a brief campus visit to give lectures and seminars to students, faculty and the general public, and to present at campus-sponsored conferences and community activities.

Each Fulbright Visiting Scholar is generally eligible for only one trip. These travel awards are intended for guest lecturing opportunities within the United States, including U.S. territories, and must occur during the Fulbright grant period. Scholars may not participate in an OLF visit during the 30-day grace periods prior to and after the grant.

Scholars are strongly encouraged to seek OLF invitations from Minority Serving Institutions (MSIs). A list of MSIs is available on the OLF website (www.cies.org/olf/). You may include two or more lecturing activities in a single trip, including visits to more than one campus. Requests are considered on a first-come, first-served basis, and CIES cannot guarantee that every request will be accepted.

Your OLF application must be approved by CIES prior to your trip. To apply, you must do the following at least 30 days in advance:

- Obtain a formal letter of invitation to give a presentation or guest lecture at a U.S. college or university;
- Complete the OLF Application Form (found here); and
- Submit the application form and letter of invitation to OLF@iie.org.

Awards are calculated using a sample itinerary from an online travel site. The price quote is rounded up to the nearest $50, in order to help offset ground transportation costs to the airport. The maximum travel award is $750. Trips of less than 75 miles are not eligible for OLF funding.

You or your OLF host institution are responsible for all additional expenses including local transportation, lodging accommodations, and meals. If the hosting institution pays for these expenses directly or reimburses you for the costs, you may accept without prior approval from CIES.
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CIES will inform you of the status of your request within two weeks of submission. Upon approval, you will receive a copy of the Evaluation Form for Fulbright Occasional Lecturers.

Submit the OLF Evaluation Form to CIES within three days of your OLF visit. You must provide a copy of your SSN or ITIN (Part III: Section 16), and the Electronic Funds Transfer Authorization Form with a voided check. Your travel award payment will be processed within four weeks of receipt. Please visit the OLF website at www.cies.org/olf/ for additional details and the online application. All questions may be directed to OLF staff at OLF@iie.org.

National Council for International Visitors

IIE is a member of the National Council for International Visitors (NCIV), a federation of community organizations that administer a range of programs, including classroom visits, special events of international interest, home hospitality and meetings with professional counterparts. In addition, these organizations are excellent resources to learn more about local attractions, transportation and accommodations. You can obtain a list of the services NCIV and their affiliates offer in more than 100 cities and towns by calling (800) 523-8101 or by visiting www.nciv.org.

CIES encourages you to take advantage of NCIV resources and participate in their activities, especially if you are not in an area that has a metropolitan enrichment program.

Fulbright Community on State Alumni

The State Alumni website, sponsored by the U.S. Department of State, is a dynamic and interactive networking tool for all participants of U.S. government-sponsored exchange programs. The Fulbright Community on State Alumni brings together current Fulbright Grantees and Fulbright Alumni and serves as the program’s virtual professional support network for the more than 310,000 Fulbright Alumni worldwide.

To join, go to http://alumni.state.gov/register. All members must register and be verified to access the full site. The verification process usually takes fewer than 10 days. FulbrightMail.org e-mail accounts are also available to State Alumni Fulbright registrants. State Alumni and FulbrightMail.org memberships are free and extend beyond your grant end date.

As part of the State Alumni community, you will be able to:

- Network with current fellows and alumni to form partnerships and friendships,
- Access free periodicals, newspapers and more (over 20,000 publications) through the Online Research Center,
- Find grant and job opportunities,
- Participate in global discussion forums and Q&A Live Web chats with experts,
- Read alumni success stories, news, perspectives and ideas, and
- Share experiences with a global audience.

The U.S. Fulbright Association

The U.S. Fulbright Association, headquartered in Washington, D.C., is a private, non-profit organization started in 1977 by U.S. alumni of the Fulbright Program. It is recognized by the U.S. Department of State as the official alumni organization serving U.S. Fulbright alumni and is one of 70 national Fulbright (Alumni) Associations
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located throughout the world. Its mission is to engage U.S. Fulbright alumni and friends of the Fulbright Program in lifelong experiences that advance international understanding through volunteer service to communities, people-to-people diplomacy and dialogue on global issues. The Association supports visiting Fulbright students, teachers and scholars from abroad through its 60 local chapters throughout the United States. Chapters provide valuable enrichment activities for visiting Fulbrighters, also showcasing opportunities to learn more the diversity of America and to meet and share ideas with U.S. Fulbright alumni. To learn if there is a Fulbright Association chapter in your vicinity, refer to the website: www.fulbright.org.

Fulbright Community on Social Media

The Fulbright Program has a growing presence on social media sites, which can be another useful way to network with other Fulbright Scholars. Alumni, grantees and prospective participants are active on the official Fulbright Facebook page (www.facebook.com/Fulbright), LinkedIn group (www.linkedin.com/groups?gid=3709849), and YouTube (www.youtube.com/fulbrightprogram) and Vimeo (http://vimeo.com/fulbright) channels. You can also follow the Fulbright Program’s Twitter feed for scholars (http://twitter.com/FulbrightSchlrs). These sources are a great way to connect and share information with fellow Fulbright Scholars, read and watch updates about the Fulbright Program, and participate in the Fulbright community.

Should you decide to share your Fulbright experiences publicly via such web-based media as blogs, here are a few things you should keep in mind:

- Avoid confusion by acknowledging that your website or blog is not an official U.S. Department of State website, and the views and information presented are your own and do not represent the Fulbright Program, the U.S. Department of State or your home government.

- While participants in all U.S. State Department-sponsored academic exchange scholarships have full academic and artistic freedom to write, publish and create, they are also expected to maintain a standard of conduct that is in keeping with the spirit and intent of the Fulbright Program—to increase mutual understanding between the people of the United States and the people of other countries.

- Any Fulbright grantee who posts inappropriate or offensive material on the Internet in relation to the Fulbright Program may be subject to revocation or termination of their grant. Be mindful that what may be considered a joke in your country, may cause people in the United States to take offense. Describing the daily challenges of living in the United States is fine, but please refrain from using disparaging language to describe the people with whom you live and work.

21. Additional U.S.-Source Income

Employment

As a researcher or lecturer holding a J-1 visa, you are eligible to engage in paid employment if it is consistent with the Fulbright Program’s purpose and if it is related to your project. Such employment must be approved in advance by the U.S. Department of State. The U.S. Department of State will not approve employment requests that would delay the end date of the grant period. Stipend supplements, ongoing lecturing and consulting opportunities are considered paid employment when you receive funds in excess of your grant. You must report any payment received as income on your tax return.
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In order to obtain approval to accept wages or income, you must submit the following letters to CIES at least 30 days before the intended employment activity will begin:

- A letter from the institution that is offering you the employment opportunity. This should state the terms and conditions of the offer, including duration, number of hours, field or subject, amount of compensation and description of the activity.
- A letter from your faculty associate recommending the activity and explaining how it would enhance your program.
- A letter from you indicating why you are interested in undertaking the employment activity and how it relates to your grant.
- If your grant is administered by the Fulbright organization in your home country, you may also be required to inform them and obtain their approval.

CIES will then forward the request to the U.S. Department of State for approval. You will receive a written response from CIES once a decision has been made. You may not engage in paid employment without the approval of the U.S. Department of State.

Honoraria

CIES considers one-time monetary compensation for participation in a single lecture or academic activity, including guest lectures, as an honorarium. If you would like to accept an honorarium, submit an invitation letter to CIES describing the activity and the amount of compensation. You will receive a written response from CIES authorizing you to accept this honorarium. If the only funds you will receive are to reimburse your expenses, you may accept this payment without prior approval from CIES.

22. Traveling Outside the United States During Your Grant Period

If you must travel outside the United States, please note the following:

- **You must notify your CIES contact person at least three weeks before any international travel.** Indicate your planned travel dates, destinations and information on how to contact you abroad.

- Before you depart the United States, **you must mail your original DS-2019 (and any dependents’ DS-2019s) to CIES for a travel validation signature,** which indicates that you remain in good standing with the Fulbright Program. This signature is valid for one year. Only a CIES representative can sign your DS-2019; the international office at your host institution cannot.

- It is your responsibility to find out if the country you intend to visit or travel through requires an entry or transit visa. Contact that country’s embassy for further information well ahead of the date of your intended visit. See [www.embassy.org](http://www.embassy.org) for information on embassies in the United States.

- To re-enter the United States you must have:
  - **Your valid passport.** Make sure your passport is valid for at least six months beyond the period of your authorized stay in the United States. If your passport needs to be renewed, it is your responsibility to contact your country’s embassy or consulate in the United States to renew your passport.
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- **Your DS-2019 validated for travel.** If dependents are traveling with you, each J-2 dependent’s DS-2019 must be validated for travel.

- **Your multiple-entry J visa.** Make sure that your visa is valid on the date you will re-enter the United States and that “M” (for multiple) or “2” (for dual) is listed under “Entries” on your J-1 and dependents’ J-2 visas.

- **If your visa allows only a single entry (“1” under “Entries”), you used your one entry when you entered the United States.** If this is the case, or if your multiple-entry visa has expired, you must renew your visa in order to re-enter the United States. You can only renew your visa at a U.S. Embassy or Consulate abroad. CIES cannot renew visas. Because many U.S. Embassies and Consulates have instituted rigorous visa processing policies, including mandatory interviews of all applicants, we urge you to examine your need to travel outside the United States and determine if it is worth the risk of delay or failure to obtain a re-entry visa for the United States. CIES and the Fulbright Program cannot guarantee that your visa application will be successful or will be processed in a timely fashion. Please be aware of these potential difficulties of traveling internationally and re-entering the United States.

- **For visits of less than 30 days to Canada, Mexico or adjacent islands other than Cuba, you will be readmitted to the United States without a valid U.S. visa if you have a valid DS-2019 and you are authorized to remain in the United States through the end date of your grant (Part III: Section 14).** Adjacent islands are defined as Saint Pierre, Miquelon, the Dominican Republic, Haiti, Barbados, Bermuda, the Bahamas, Jamaica, the Windward and Leeward Islands, Trinidad, Martinique and other British, French, and Dutch territories or possessions bordering on the Caribbean Sea. Contact the embassy or consulate of the country you intend to visit for more information, as you may be required to obtain an entry visa to enter these countries.

**Insurance Coverage Outside the United States During the Grant Period**

When you travel outside the United States during your grant period, the Accident and Sickness Program for Exchanges (ASPE) policy will not cover you unless the travel was included in your initial grant. If the travel was included in your initial grant proposal, please confirm with CIES that you will be covered during this period. If your travel is related to your research or lecturing, but was not initially part of your grant proposal, you must obtain U.S. Department of State approval for ASPE coverage to continue during your travel outside the United States.

To request approval, notify CIES of your international travel plans and their relevance to your research or lecturing and provide a letter of support from your faculty associate. CIES will forward your request to the U.S. Department of State and will advise you if it is approved.

If you do not have this approval, your coverage will expire the day you leave the United States and will be reinstated upon your return. **Sources of Dependent, Supplemental and Short Term Insurance** lists a number of insurance providers who offer short-term insurance coverage, which can be used while you are outside the United States.
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Adjustment in Stipends

If CIES administers your grant payments, your stipend amount may need to be adjusted depending on the number of days you are outside the United States. If the total number of days of all trips outside the United States within your grant period exceeds 15, then your stipend will be reduced according to the “Stipend Adjustments for Time Outside the United States” chart.

If your grant is not paid by CIES, please check with the Fulbright organization in your home country to determine if stipend adjustments are required. In limited circumstances, such as personal emergencies, it may be possible to add the time spent outside the United States onto the end of your grant period. Your CIES contact person, the Fulbright organization in your country and your host institution must approve such an arrangement in advance.

23. Tax Matters

U.S. Income Tax

This section applies to scholars who will receive income from CIES and/or other U.S. sources during their stay in the United States. CIES sends the necessary tax instructions, materials and forms to all CIES-paid scholars, including scholars who received travel awards under the Occasional Lecturer Fund.

If you receive income from any other U.S. source, such as your host university, you should obtain information about your tax obligations from that source.

You must pay income tax to the U.S. government on the income you receive from U.S. sources unless you are exempt or excused under a tax treaty or special ruling of the Internal Revenue Service (IRS). Income from U.S. sources refers to funds provided to you by any institution or organization in the United States, whether these funds were disbursed in the United States or not. Income generally includes stipend payments and allowances, travel costs, honoraria for lecturing (Section 21) and any other special payments.

Ultimately, compliance with tax laws and regulations is your responsibility. Keeping good financial records all year long will make completing and filing your tax return easier. For copies of tax forms or more information about U.S. income tax, speak to an IRS representative.

To locate your local IRS Taxpayer Assistance Center, consult the IRS website at www.irs.gov/localcontacts/index.html. You may wish to talk to the Fulbright office in your home country for information on tax assistance.
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**Withholding**

To ensure that taxes are paid on your income, the U.S. government requires IIE/CIES to withhold, 14 percent of your income for U.S. income tax. CIES sends the withheld funds to the IRS, which credits your tax account. If you receive income from any U.S. source other than CIES, you are also subject to withholding by that source.

**Tax-Treaty Status**

Current tax treaties between the United States and other countries may exempt some Fulbright Scholars from withholding and payment of federal income tax though they must still file income tax returns. The provisions of these treaties vary and exemptions are not automatic. If you are a citizen of a tax-treaty country and meet the tax-treaty qualifications, you may be exempt from withholding of U.S. income taxes while you are temporarily in the United States.

If the United States has a tax treaty with your country, and you meet the necessary requirements, CIES will include a copy of the relevant article of the treaty with your grant packet. You can also find copies of these treaties in most IRS offices, through the IRS website and in many public libraries in the United States. General information on each treaty is included in IRS Publication 519 (U.S. Tax Guide for Aliens) and Publication 901 (U.S. Tax Treaties), which you may download from the IRS website at www.irs.gov.

If your treaty states that the lecturing or research you are doing must be at an accredited institution of higher learning, no other type of institution will qualify.

The IRS makes the final decision on whether your country’s tax treaty exempts you from U.S. income tax. If you are exempt and you receive grant payments from your host institution, consult with institution officials, not CIES, regarding your tax-exempt status.

If your country’s tax treaty exempts you from paying U.S. income taxes, you must complete Form W-8BEN, which will be included in your grant packet. If your country does not have a tax treaty with the United States, Form W-4 will be included in your grant packet. You should submit either Form W-8BEN or Form W-4 to CIES as soon as possible after you receive your SSN or ITIN. You can also download the forms from the IRS website at www.irs.gov.

You may not claim the benefit of tax exemption under an income tax treaty if you do not have either an SSN or an ITIN.

**Filing a Tax Return**

**If you receive funds from a U.S. source (even if you are exempted by a tax treaty) you must file a federal tax return every calendar year in which you received these funds.**

Federal law requires that your SSN or ITIN appear on your tax return. It is very important that you write your name on your tax return exactly as it appears on your SSN or ITIN card.

In some instances, CIES may offer GRANTAX® tax-filing services. Please refer to your terms and conditions of award to see whether GRANTAX® is offered. CIES will provide detailed instructions in the following year in which you received grant funds.
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If you are not eligible for GRANTAX®, by March 15, following the calendar year in which you received grant funds, CIES will send you the following forms:

- Form 1042S (Foreign Person’s U.S. Source Income Subject to Withholding), reporting the income you received and the tax withheld (if any) from the grant during the prior calendar year. CIES will also report this information to the IRS. For example, in March 2014, CIES will mail you a 1042S covering income you received in calendar year 2013.

- Form 1040NR-EZ or Form 1040NR (U.S. Income Tax Return for Certain Nonresident Aliens with No Dependents) and instructions.

Because income tax regulations are complex and change frequently, CIES is not permitted to give tax advice. If you have specific questions about your tax return after you have received the packet of information, contact your local IRS Taxpayer Assistance Center listed in the telephone directory or online, or you may call the IRS Taxpayer Services Office in Philadelphia at (215) 516-2000 (not toll free).

You may owe more or less tax than the amount CIES withheld from your stipend payments. If you owe less, you will receive a refund from the IRS after filing your tax return. If you owe more, you must write a check to the U.S. Treasury and submit it with your tax return.

All organizations that issue grants are responsible for providing tax documentation to grantees and for reporting their grant income to the IRS. If you are receiving funds from any organization other than CIES, contact that organization for tax information.

You may find that some of your expenses in the United States are tax deductible as business expenses under U.S. income tax regulations. To find out more about tax-deductible business expenses, see Form 2106 (Employee Business Expenses). You can obtain this form by calling the IRS at (800) 829-3676 within the United States. IRS forms and publications are also available online at www.irs.gov/formspubs/index.html.

Filing IRS Form 8843

All Fulbright Scholars, regardless of income (U.S. or foreign source), must file Form 8843, which establishes your presence in the United States as a non-resident alien.

If eligible for GRANTAX® services, GRANTAX® will prepare and submit Form 8843 on your behalf.

If not eligible, this form should be sent with your annual tax return.

If you are not required to file an annual tax return, you should mail Form 8843 to the address provided in the form’s instructions. You can download the form and instructions from the IRS website at www.irs.gov.

State Income Tax

Most of the individual states of the United States also tax the income of their residents. If you receive income from a U.S. source, ask your host institution about your state income tax obligations and obtain detailed information from the state tax office nearest your host institution.

Laws differ from state to state, and state laws are not always the same as the federal laws. Some states do not have treaties with foreign countries and will tax your income even though it is exempt from federal taxation.
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After you determine your state income tax liability, consult a tax advisor or your nearest state tax office to determine how to handle any state tax obligations.

**Social Security Tax**

Social Security is the U.S. national retirement plan. A portion of every American paycheck is automatically deducted for Social Security and Medicare. As J-1 visa holders, Fulbright stipends and/or other U.S. Department of State-approved funding are not subject to the Social Security and Medicare tax. If you receive a stipend from a university and Social Security tax is withheld (identified as FICA on paycheck stub) during your Fulbright Grant, you should bring the mistake to the attention of university officials.

The wages of J-2 visa holders (Part II: Section 11) are usually subject to the tax.

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24. J. William Fulbright Foreign Scholarship Board Grant Termination Policy

Grounds for revocation or termination of Fulbright Awards include, but are not limited to:

1. Violation of U.S. laws or those of your home country.
2. Actions clearly contrary to the spirit of mutual understanding.
3. Failure to observe satisfactory academic or professional standards.
4. Physical or mental incapacitation.
5. Engaging in unauthorized income-producing activities.
6. Failure to comply with the terms and conditions of the grant.
7. Material misrepresentation made by the grantee in a grant application or grant document.
8. Conduct which may have the effect of bringing the U.S. Department of State or the Fulbright Program into disrepute.
9. Violation of the policies of the J. William Fulbright Foreign Scholarship Board (FFSB).

The FFSB also has authority to terminate a grant on either of the following grounds:

- The grantee has exhausted all benefits of accident and sickness plan provided to the grantee by the U.S. Department of State in connection with the grant, and continued medical treatment would lead to the grantee’s becoming a public charge, or
- The grantee requires such protracted medical treatment that successful completion of the grant is jeopardized.
- Medical information submitted in the application is found to be substantially inaccurate or incomplete.

Should any such event occur during the period of a grant, it is FFSB policy that such grant should not be renewed or extended. The decision for termination shall be made solely by the FFSB.

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Part V: At the End of Your Grant Period