

# Fulbright Scholar Program

## Guide for Fulbright Visiting Scholars



FULBRIGHT

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## J. William Fulbright: A Brief History

J. William Fulbright was a prominent and gifted American statesman of the 20th century. His unequalled contributions to international affairs and his tenure as the longest serving chairman of the Senate Foreign Relations Committee distinguished his political career of over 30 years in the United States Congress. He had profound influence on America's foreign policy and his vision for mutual understanding shaped the extraordinary exchange program bearing his name.

With the support of the United States government and through binational partnerships with foreign governments, the Fulbright Scholarship Program sponsors U.S. and foreign participants for exchanges in all areas of endeavor, including the sciences, business, academe, public service, government and the arts and continues to increase mutual understanding between the people of the United States and the people of other countries.

His legislation establishing the Fulbright Program passed the U.S. Senate by unanimous consent in 1945 and drew strength from the United States' national commitment to develop post-war leadership and engage constructively with the community of nations. The legislation was signed into law by President Harry S. Truman in 1946. The first participants in the Fulbright Program went overseas in 1948, funded by war reparations and foreign loan repayments to the United States. This program has had extraordinary impact around the world. There have been over 370,000 Fulbright students, scholars and teachers; many have made significant contributions within their countries, including the United States, as well as to the overall goal of advancing mutual understanding.

J. William Fulbright was born on April 9, 1905, in Sumner, Missouri. He was educated at the University of Arkansas where he earned the B.A. degree in political science in 1925. He then attended Oxford University where he received an M.A. degree and was transformed by his international experience.

When Fulbright returned to the United States, he studied law at The George Washington University in Washington, D.C. During the 1930s, he served in the Justice Department and was an instructor at The George Washington University Law School. In 1936, he returned to Arkansas where he was a lecturer in law and, from 1939 to 1941, served as the president of the University of Arkansas, at the time the youngest university president in the country.

He ran for political office in 1942 and was elected to the U.S. House of Representatives; he entered Congress in January 1943 and was appointed to the Foreign Affairs Committee. In September of that year, the House adopted the Fulbright Resolution, supporting an international peace-keeping mechanism encouraging United States participation in what became the United Nations. His leadership on this issue brought national attention to Congressman Fulbright.

In November 1944, he was elected to the U.S. Senate and served there from 1945 through 1974, becoming one of the most influential and best-known members of the Senate. In 1949, Senator Fulbright became a member of the Senate Foreign Relations Committee. From 1959 to 1974, he served as chairman of the committee.

His Senate career was marked by notable instances of principled dissent. In 1954, he was the only Senator to vote against an appropriation for the Permanent Subcommittee on Investigations, which was chaired by Senator Joseph R. McCarthy; and, in 1961, he lodged objections to President John F. Kennedy in advance of the Bay of Pigs invasion. He was in the spotlight as a powerful voice in the turbulent Vietnam War era, when he chaired the Senate hearings on U.S. policy and the conduct of the war. In 1963, Walter Lippman, a widely respected American journalist, wrote of Fulbright: "The role he plays in Washington is an indispensable role. There is no one else who is so powerful and also so wise, and if there were any question of removing him from public life, it would be a national calamity."

Senator Fulbright worked to build national consensus around the arts. He supported the creation of a national center for the arts, and his initial legislation led to the founding of the Kennedy Center for the Performing Arts in Washington, D.C.

After serving five consecutive terms in the U.S. Senate, Senator Fulbright was defeated in Arkansas' 1974 Democratic primary. He then served as counsel to the Washington law firm of Hogan & Hartson and remained active in support of the Fulbright Program. He received numerous awards from governments, universities and educational organizations across the globe for his efforts on behalf of education and international understanding. In 1993, he was awarded the Presidential Medal of Freedom by President William J. Clinton.

Senator Fulbright was married to Elizabeth Williams Fulbright for more than fifty years, from 1932 until her death in 1986. They had two daughters, Roberta Fulbright Foote and Elizabeth Fulbright Winnacker. Senator Fulbright married Harriet Mayor in 1990.

On February 9, 1995, Senator J. William Fulbright died in Washington, D.C. at the age of 89.

# Welcome to Fulbright!

*“The Fulbright Program aims to bring a little more knowledge, a little more reason, and a little more compassion into world affairs and thereby to increase the chance that nations will learn at last to live in peace and friendship.”*

—Senator J. William Fulbright

Congratulations on your selection as a Fulbright Scholar!

Welcome to a community of academics and professionals from around the world who have come to the United States as Fulbright Scholars. The United States Department of State’s Bureau of Educational and Cultural Affairs (ECA) and the Institute of International Education’s (IIE) Council for International Exchange of Scholars (CIES) welcome you. Together, the U.S. Department of State, as the program sponsor and IIE, as a private cooperating organization, administer the Fulbright Visiting Scholar Program for visiting faculty and professionals.

*The Guide for Fulbright Visiting Scholars* is designed to acquaint you with your responsibilities, help you prepare for the program and serve as a reference during your grant. As a Fulbright Scholar, the expectation is that you carefully *read* and *understand* the guidelines provided. If the Guide does not provide answers to all your questions or any information that is presented is not clear, please contact the Fulbright organization in your home country or your IIE/CIES advisor prior to your departure. **The Guide is a valuable resource during your stay in the United States and you are encouraged to reference it often.**

During your stay in the United States, IIE/CIES advisors will be available to assist you whenever possible. You can find a list of IIE/CIES advisors on our website at <http://www.cies.org/program-advisors>. For information and advice about academic and campus matters, consult your faculty associate or the office of international programs at your host institution.

We wish you every success in your professional and personal endeavors and trust that your experience as a Fulbright Scholar will be a rewarding one.

# Part I: Fulbright Program and Grant Provisions

1. Overview of the Fulbright Program
2. Fulbright Program Administration and Funding
3. Terms and Conditions and Grant Dates
4. Grant Benefits
5. Grant Payments and Stipends



# Part I: Fulbright Program and Grant Provisions

## 1. Overview of The Fulbright Program

Shortly after World War II, Senator J. William Fulbright, from the state of Arkansas, sponsored the legislation that laid the foundation for the Fulbright Program. President Harry S. Truman signed it into law on August 1, 1946. Although subsequent laws have refined and expanded the program (primarily the Mutual Educational and Cultural Exchange Act of 1961, also called the Fulbright-Hays Act), its basic objective has endured: to promote mutual understanding between the people of the United States and the people of other countries.

Senator Fulbright believed that, through educational exchange, people would better understand citizens and cultures of other nations. This objective remains crucial more than 70 years after the program's inception.

In the history of the program, over 370,000 people representing over 160 countries have benefited from a Fulbright experience. Annual appropriations from the U.S. Congress to the Department of State, along with contributions from other governments and the private sector, provide financial support for the program.

The Fulbright Program offers U.S. citizens and nationals of other countries grants for university lecturing, advanced research, graduate study and teaching in elementary and secondary schools. The scholar component of the Fulbright Program provides opportunities for intellectual and cultural pursuits in an environment of academic freedom and binational cooperation.

Fulbright Scholars are selected in part for their demonstrated leadership potential. The success of your Fulbright grant depends on your initiative and input as well as taking advantage of the resources and program enrichment activities available to you. Beyond your academic and professional pursuits, we encourage you to live the goals of the Fulbright Program by learning about the United States—its society, customs, history and culture—and sharing knowledge about your own country with Americans. Your dedication to cultural exchange contributes to the ongoing realization of the Fulbright Program's goal of mutual understanding.

## 2. Fulbright Program Administration and Funding

The Fulbright Foreign Scholarship Board (FFSB)

The FFSB, composed of 12 educational and public leaders appointed by the President of the United States, formulates policy for the administration of the program, establishes criteria for the selection of candidates and makes final selections of candidates nominated for awards.

- <http://eca.state.gov/fulbright/about-fulbright/j-william-fulbright-foreign-scholarship-board-ffsb>

## Part I: Fulbright Program and Grant Provisions

### **United States Department of State, Bureau of Educational and Cultural Affairs (ECA)**

ECA directs the administration of the Fulbright Program under policy guidelines established by Fulbright Foreign Scholarship Board. ECA prepares annual budget requests from Congress for the Fulbright Program and establishes program priorities. ECA collaborates with the binational Fulbright Commissions and Foundations in 49 countries, United States Embassies in approximately 100 other countries and many cooperating agencies in the United States in the administration of the Program.

- <http://eca.state.gov/>

### **The Institute of International Education's Council for International Exchange of Scholars (IIE/CIES)**

administers the Fulbright Scholar Program for faculty and professionals. IIE/CIES provides services to all scholars during their stay in the United States, including enrollment in health benefits, guidance on immigration matters and facilitation of enrichment programs. CIES manages a wide variety of educational and cultural exchanges as well as training and technical assistance programs. Through a cooperative agreement with ECA, IIE has administered parts of the Fulbright Program since 1946. CIES was created in 1947 by the Conference Board of Associated Research Councils, a national body consisting of four academic societies: The American Council of Learned Societies, the National Academy of Sciences, the Social Science Research Council and the American Council on Education.

- [www.cies.org](http://www.cies.org)
- [www.iie.org](http://www.iie.org)

**Fulbright Commissions, Foundations and U.S. Embassies** supervise scholar competitions locally and assist in program development and provide pre-departure services and counseling. Many Commissions also establish the number and categories of Fulbright grants to be offered each year, and administer grants for scholars from their countries, including issuing grant payments and grant Terms and Conditions.

- <http://eca.state.gov/fulbright/about-fulbright/funding-and-administration/fulbright-commissions>
- [www.usembassy.gov](http://www.usembassy.gov)

### **Funding**

The primary source of funding for the Fulbright Program is an annual appropriation made by the U.S. Congress to the U.S. Department of State. Participating governments and host institutions in many countries and in the United States also contribute financially through cost sharing, as well as by indirect support such as salary supplements, tuition waivers, university housing and other benefits.

## **3. Terms and Conditions and Grant Dates**

The benefits and details of your award are described in your grant Terms and Conditions. For grants administered by IIE/CIES, this is a six-page document with signatures

## Part I: Fulbright Program and Grant Provisions

on the first page. (Some Commissions refer to this as your grant document, authorization or agreement.) Be certain to read the Terms and Conditions of your grant thoroughly. Sign the document where necessary and return it to the Fulbright organization from which you received it as soon as possible. You should also bring a copy of your Terms and Conditions with you to the United States for reference during the year. If you have any questions, consult either the Fulbright organization in your home country or IIE/CIES.

The grant period begins on the date you arrive at your host institution to begin your grant activities. If you must travel outside the United States during your grant or leave before the date your grant period expires, you are required to inform both IIE/CIES and your host university in advance ([Section 24](#)).

### 4. Grant Benefits

Basic benefits to Fulbright Visiting Scholars generally include:

- Round-trip travel from your home country to your host institution in the U.S.
- Financial support while in the U.S.
- Benefits in the event of accident and sickness for the period of the grant
- Access to professional and cultural enrichment opportunities

### 5. Grant Payments and Stipends

#### Grant Payments and Stipends Issued by the Home Country

If your grant payments are issued by the Fulbright organization in your home country, they are subject to the organization's instructions, guidelines and schedules. Before departure for the United States, this organization will contact you regarding the schedule of your grant payments.

#### Grant Payments and Stipends Issued by IIE/CIES

Scholars paid by IIE/CIES receive a monthly stipend and dependent allowances, if applicable, every three months. Professional and settling-in allowances will only be provided in the first payment. Your grant Terms and Conditions indicate which of these allowances you will receive. To ensure your first payment is not delayed, sign your Terms and Conditions and return it to the Fulbright organization from which you received it as soon as possible. **IIE/CIES cannot send your first grant payment until you submit your signed Terms and Conditions.**

**Taxes:** Stipends and other grant benefits are taxable, and IIE/CIES provides information and in the case of IIE-paid Fulbrighters direct support in filing their taxes each year. IIE/CIES must withhold 16.28 percent of all payments to scholars, except those participating in designated grant activities and from countries with an applicable tax

## Part I: Fulbright Program and Grant Provisions

treaty ([Section 24](#)). However, the Department of State covers the costs of those taxes in advance, so the amount each scholar receives in their payments will be equal whether your country has an applicable tax treaty or not.


**Monthly stipend:** The U.S. Department of State sets monthly stipend rates based on the cost of living in the location of the host institution. IIE/CIES-paid scholars receive stipend payments every three months from the beginning of their grant. Each payment will contain a three-month sum of the designated stipend rate; if the time remaining in the grant is less than three months, the amount will reflect the remaining monthly payments.

**Professional allowance:** A one-time allowance added to the first grant payment to help cover the cost of:

- Educational and professional materials,
- Photocopying,
- Laboratory and registration fees,
- Computers or computer time, and
- Travel to and from professional meetings, conference or to other U.S. academic institutions to consult with colleagues.

**Settling-in allowance:** A one-time allowance added to the first grant payment intended to help cover the cost of temporary housing and items that you may need to set up a household after arriving in the United States.

**Dependent allowance:** A monthly allowance intended to help cover the cost of health insurance for your accompanying dependents (spouse, qualified same-sex domestic partner or unmarried children under 21 years of age) will be paid every three months along with your monthly stipend. The total amount of the allowance is determined by the number of dependents and the length of your grant. **You are only eligible for this allowance if one or more dependents are with you for at least 80 percent of the grant period.** If your dependent stays less than 80 percent of the grant period, you are not eligible for a dependent allowance.

- 
6. [Pre-departure Checklist](#)
  7. [Travel Documents](#)
  8. [International Travel](#)
  9. [Participant Portal](#)
  10. [Planning to Arrive in the United States](#)
  11. [Health Benefits](#)
  12. [Dependents](#)
  13. [What to Bring](#)
  14. [Communication with Faculty Associate](#)

## Part II: Preparing to Leave for the United States

### 6. Pre-departure Checklist

This checklist is designed to help you organize your departure from your country and your arrival in the United States.

- Review Form DS-2019(s) (which have been issued by IIE/CIES) for you and any accompanying dependents and report any inaccuracy to the Fulbright organization in your home country ([Section 7](#)).
- Apply for your J-1 visa and have each eligible accompanying dependent apply for their J-2 visas ([Section 7](#)).
- Obtain international air tickets ([Section 8](#)).
- Review your accident and sickness benefits and research (or purchase, if possible) health insurance for accompanying dependents ([Section 11](#) and [Section 12](#)).
- Contact your faculty associate regarding your arrival ([Section 14](#)).
- Inform the Fulbright organization in your home country and your faculty associate at your host institution of the following:
  - Your arrival date
  - Your complete itinerary, including all airlines, flight numbers, transfer cities, dates and times
  - The names of any J-2 dependents who will accompany you
- Research housing options and, if possible, begin finalizing long-term housing arrangements ([Section 10](#)).
- Arrange for temporary accommodations, if needed ([Section 10](#)). Pack essential items ([Section 13](#)).
- Give IIE/CIES contact information to your family: <http://www.cies.org/program-advisors>

### 7. Travel Documents

To enter the United States, you must have:

- A valid passport
- Original form DS-2019 (**NOT a scan**)
- J-1 visa stamp

**Make sure the information in these documents is correct and that your name is spelled exactly the same way on all your travel documents (passport, Form DS-2019, J-1 visa and airline ticket).** Do not put these documents in any checked luggage. Keep them, along with your grant Terms and Conditions, with you. Additionally, keep your short-term or long-term U.S. address with you to complete arrival documentation at the port of entry.

#### Passport

**You are permitted to use only one passport during your Fulbright grant.**

## Part II: Preparing to Leave for the United States

Use this passport when applying for your J-1 visa and when traveling to and from the United States. Make sure the expiration date on your passport, as well as on any accompanying dependents' passports, is at least six months beyond the end date of your grant.

### Form DS-2019 (Certificate of Eligibility for Exchange Visitor Status)

The Student and Exchange Visitor Information System (SEVIS) is a web-based application that maintains accurate and current information on students, exchange visitors and their dependents throughout the duration of approved participation within the U.S. education system. IIE/CIES is responsible for providing information about your program to SEVIS so that you remain in compliance with J-visa regulations.

The Fulbright organization in your home country will provide you with a SEVIS-generated Form DS-2019 issued by IIE/CIES. [\(See Appendix A for a sample DS-2019 form.\)](#) **Please review this form and make sure that all the information is correct. Please notify your Fulbright partner contact in your home country immediately if corrections are needed.** The dates on your DS-2019 are the start and end dates of your Fulbright grant. It is advisable to make a copy of the DS-2019 for your records prior to submitting your visa application. You must present the original DS-2019 to the consular officer when applying for your J-1 visa. This form is presented with your passport at the U.S. port of entry. **Do not use a DS-2019 issued by your U.S. host institution or any organization other than IIE/CIES.**



### Exchange Visitor (J) Visa

You must enter the United States on an Exchange Visitor (J-1) Visa, issued under the sponsorship of the U.S. Department of State Exchange Visitor Program Number G-1-00005. Your spouse and any unmarried children under the age of 21 are eligible to accompany you on J-2 dependent visas. If one of your children turns 21 during your grant period, that child's J-2 immigration status will end on his or her 21st birthday. Therefore, he or she must leave the country before he or she turns 21 years old. They may be eligible for B-1/B-2 visa classification to visit the United States as tourists for a maximum of six months. In some instances, such as with same-sex domestic partners, an extended B-1/B-2 may be requested. Please check with your local U.S. Embassy or Consulate regarding eligibility or related questions.

### Exchange Visitor (J-1) Visa

## Part II: Preparing to Leave for the United States

If you need J-2 visas for eligible dependents, you must advise the Fulbright organization in your



## Part II: Preparing to Leave for the United States

home country as soon as possible, as the Fulbright program must issue each dependent their own DS-2019. Your dependents may accompany you or arrive separately after you enter the United States.

**Dependents cannot arrive in the United States before you do.** All J-2 DS-2019s will have dates identical to your J-1 DS-2019 dates, even if their actual stay will be for a shorter period.

### **Both J-1 and J-2 visa holders will be subject to limitations on re-entering the United States in the future.**

Dependents who are U.S. citizens are welcome to accompany you on your grant, but will not be issued DS-2019s as J-2 dependents and must travel on their U.S. passport.

### **Applying for the J Visa**

You should apply for your J visa at the U.S. Embassy or Consulate in your home country. Please consult your contact at the Fulbright organization in your home country for more information about applying for your J visa. Although you may apply at any U.S. Consular Office abroad, it may be more difficult to qualify for the visa while outside your country of permanent residence.

**Apply for your visa early to provide ample time for visa processing.** A personal interview is almost always required as a standard part of visa processing, and it may take several weeks before you can get an appointment for your interview. The typical application process could take up to three months. A consular officer may need to request special clearances depending on your field of study, nationality or background. This will take additional time.

An I-901 SEVIS fee is required of most individuals upon application for a J visa. However, for those individuals sponsored by the U.S. government, such as Fulbright Scholars and their dependents, this fee is waived. **There is no cost for applying for a visa as a Fulbright Scholar or accompanying dependent.**

### **Required Documentation for J Visa Applications**

Each applicant for an exchange visitor visa must submit to the U.S. Embassy or Consulate:

- An application Form DS-160 (Online Nonimmigrant Visa Application). The form is available at <http://travel.state.gov>. Be certain to bring the DS-160 application form confirmation to the interview appointment;
- A passport valid for travel to the United States. Make sure the expiration date on your passport is at least six months beyond the end date of your grant period. If more than one person is included in the passport, each person desiring a visa must complete an application;
- One 2-inch x 2-inch photograph (about 50 mm square); and,
- A valid DS-2019 issued by IIE/CIES.

## Part II: Preparing to Leave for the United States

It is important that you refer to the U.S. Embassy or Consulate website to find out if additional documents are required. You must demonstrate to the consular officer that you have permanent ties to your home country and you are coming to the United States for a temporary period. All J visa applicants will be fingerprinted and photographed as part of the visa application process.

Although IIE/CIES may issue a DS-2019, this form only denotes the eligibility for J visa status. It is ultimately the decision of the consular officer whether to issue a visa.

### 8. International Travel

#### Airline Tickets and Travel Arrangements

The Fulbright organization in your home country will either arrange or explain how to arrange your international travel. Air travel paid with U.S. government funds must conform to the Fly America Act (<https://www.gsa.gov/policy-regulations/policy/travel-management-policy/fly-america-act>), which requires all such travel be on American Flag Carriers where available. If you are independently arranging your travel plans, please submit your itinerary for review by the Fulbright organization in your home country **before** purchasing a ticket. In cases where the Fulbright organization refers you to a travel agency for assistance with your travel arrangements, the agency is aware of applicable regulations and you do not need to submit your itinerary for review.

Before you leave your home country, please examine your ticket for the following:

- Is the ticket valid for the period of your grant?
- Does the ticket have any restrictions on its use?
- Does your name appear the same on your ticket as it does on your passport and other travel documents?
- Is your return ticket reserved for a specific date or flight number or is it an open ticket?

If it is necessary to make your own travel arrangements, it is important to understand the restrictions and possible penalties associated with the purchased ticket. Many of the cheaper fares are nonrefundable and changes in dates or flights are either not allowed or allowed by paying a fee. Ask a travel agent or an airline representative for specific details. You may be able to purchase an open ticket, which permits greater flexibility for your return travel.

Check with your airline regarding regulations and fees for excess baggage. If allowed, excess baggage charges may be costly.

**Make appropriate arrangements if you require any transit visa.**

## Part II: Preparing to Leave for the United States

When booking travel for your dependents, be aware that J visa regulations prohibit J-2 dependents

## Part II: Preparing to Leave for the United States

from entering the United States **before** the J-1 visa holder. J-2 visa holders can only enter the United States with you or after your arrival.

### Customs

For customs information, please refer to the most up-to-date information at the U.S. Customs and Border Protection website at <https://www.cbp.gov/>.

## 9. Self-Service Participant Portal

Prior to departure, you will receive access to IIE's Fulbright [Self-Service Portal](#). This interactive and secure online portal will be available to you throughout your grant and will provide you with the ability to complete the following:

- Review key information we have on file yourself, your dependents, and your host institution.
- Access and download important documents and resources for your grant.
- Submit documentation to your IIE/CIES program advisor to validate your arrival in the United States and to support other activities associated with your grant.
- Inform your IIE/CIES program advisor of any international travel plans during your grant as required per the terms of your grant award.

### IIE's Fulbright Self-Service Portal's welcome page.

**iie** The Power of International Education

Fulbright Visiting Scholars Program (2003 - 2005) ✓

Hi, New Portal1 | Change Password | Change Email | Logout

Problem With Site? Feedback?

**My Program** +

- Personal Information +
- Health Benefits +
- Documents +
- Travel +
- Final Departure +
- Tax Information +

Welcome to IIE's Secure Portal!

**Prior to arrival in the U.S.:**

- Submit **Withholding Form W-8BEN**
- Ensure your **Primary Email** will be valid and accessible throughout your program

Within **ten days** of your program start date:

- Submit **arrival documents**
- Report your **U.S. physical and mailing address**
- Report **J-2 health insurance** for accompanying dependents

You can also:

- Review your **program details**
- Find your **IIE Advisor** contact information
- View your **Participant ID and personal information**
- Enter **emergency contacts**
- Access your **ASPE Health Benefits details**
- Submit **documents**
- Report your **social security number**
- Request **international travel**

Are you currently living at this address?

New Portal1 Test 1a  
3rd road  
4th line  
test  
test  
Australia, 456987

Update Address

## Part II: Preparing to Leave for the United States

### 10. Planning to Arrive in the United States

Plan to arrive in the United States as near as possible to the date recommended by your host university. U.S. Citizenship and Immigration Services (USCIS) allows you and your dependents to legally enter the United States up to 30 days prior to the start date that appears in section three of your DS-2019.

You may not engage in grant-related activities, work, or travel heavily\* during this period, though IIE/CIES suggests that you arrive before your program start date to settle in. Please note that your Fulbright-sponsored accident and sickness benefits are not valid for this period. You may wish to purchase a separate insurance policy during this time.

\*It is especially critical that after you have entered on your IIE-issued DS-2019/J1 Visa for your Fulbright that you not exit and re-enter the United States on your J visa during this 30-day pre-grant period. Your SEVIS immigration record cannot be validated nor approved for international travel until AFTER your official grant period has started, and even then only with pre-approval from IIE/ECA as requested through IIE's [self-service portal](#).

**It is important that you commence your grant-related activities, such as conducting research or lecturing, on the date indicated in section three of your DS-2019. It is your responsibility to communicate any delays to your grant start date to your IIE/CIES contact and faculty associate.**

It is essential that you correspond with your faculty associate before you leave your home country. Be sure to provide him or her with further details about your academic interests as well as your travel plans. You can also request more detailed information about the facilities that will be available for your use on campus. If you are unsure of who your faculty associate is, contact the Fulbright organization in your home country.

#### Housing

**You must make your own housing arrangements; IIE/CIES is not able to assist you with this process.** If you have not already received information on housing, contact your host institution. The Fulbright organization in your home country may have been provided with some university-specific housing information on the "Institutional Reply Form (IRF)." Finding suitable accommodations in many U.S. cities can be difficult and costly. IIE/CIES advises you to inquire several months in advance. It may be necessary to stay in temporary accommodations for a few days or weeks until you are able to find long-term housing. Additionally, you may have to pay a security deposit and/or your first and last month's rent upon signing a lease. **Please bring adequate funds in anticipation of this expense**, as your first Fulbright payment may not be immediately available due to bank processing times.

## Part II: Preparing to Leave for the United States

It is important to make arrangements for housing before you arrive, so you will not be searching for a place to live at a time when you have many other concerns. Many housing resources are available via the Internet.

### **Renter's Insurance**

The Fulbright Program does not provide or reimburse insurance coverage for your personal possessions. It is recommended that you purchase renter's insurance to cover any valuable possessions, such as computers and other electronics, bicycles, jewelry, clothing and furniture. Renter's insurance covers the value of your personal property against theft or damage, caused by incidents such as fires or floods, both in your home and while you are away from home.

Research your policy carefully before purchasing renter's insurance. Look for policies providing replacement value coverage, which will reimburse you for the replacement value of your damaged or stolen property, rather than for the property's current (and usually lesser) value. Rates vary depending on the type of coverage, your location and the amount you would like insured. You should expect to pay a deductible; choosing a higher deductible can lower the overall cost of your policy. Please review coverage limits and deductibles carefully when comparing policy options as these can vary greatly between insurance providers.

### **Transportation**

Public transportation may not be readily available around your host institution. If you decide to get a car, you must purchase car insurance. Each state has different driver's license application procedures, requirements and regulations. Contact the local department of motor vehicles to understand their individual policies. Furthermore, not all states recognize the international driving permit and international driver's license or car insurance.

## **11. Health Benefits**

Your Fulbright grant includes health benefits coverage for accidents and sickness. This is a health benefit plan and not considered health insurance coverage. This section details the benefits and limitations of your coverage and provides useful advice on obtaining supplemental coverage.

### **Completion of Medical History and Examination Form**

You must submit a completed Medical History and Examination Form to the Fulbright organization in your home country no earlier than six months before departure for the United States. The Fulbright Program recommends that you have up-to-date immunizations for all diseases indicated on the form. The health benefits coverage provided through the U.S. Department of State will not cover any illness

## Part II: Preparing to Leave for the United States

contracted in the United States resulting from a failure to receive required immunizations. While medical clearance will not be withheld if the immunizations are not obtained, some universities may require them before confirming your affiliation.

### **Medical Checkup**

Since the accident and sickness benefits provided by your grant do not cover the cost of eye examinations, eye glasses, contact lenses or dental examinations, you are advised to receive eye and dental exams prior to coming to the United States. You should complete any necessary treatment before you leave home.

### **Health Benefits Coverage: The Accident and Sickness Program for Exchanges**

The U.S. Department of State provides essential accident and sickness coverage for Fulbright Scholars under a self-funded group policy called the Accident and Sickness Program for Exchanges (ASPE). This policy is not intended to cover preventative care such as annual examinations or check-ups.

Your ASPE health benefits policy is administered by:

*Seven Corners, Inc.*  
303 Congressional Blvd.  
Carmel, IN 46032  
Telephone: (800) 335-0611  
Website: [www.usdos.sevencorners.com](http://www.usdos.sevencorners.com)

The complete *Your ASPE Guide to Health Care Coverage* may be found online at [www.usdos.sevencorners.com](http://www.usdos.sevencorners.com).

### **ASPE Identification Card**

Prior to your arrival, IIE/CIES will send you an email outlining how to access your ASPE benefits card and information. It's recommended that you download and print a copy of your benefits card to keep with you at all times. Visit the Seven Corners website for health care provider information. Coverage will begin when you report to your host institution to start your grant activities. Your coverage continues while you are in the United States until your grant end date.

If your grant is amended to either shorten or extend the length of your program, IIE/CIES will adjust your health benefits coverage and an updated version of your benefits card will be accessible on the provider's website.

### **Mental Health Counseling and Support: ASPE Assist**

As a Fulbright Visiting Scholar, you also have access to a virtual resource called the ASPE Assist hotline which is a 24/7 counseling and support service available to all Visiting Scholar grantees while they are

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on program. ASPE Assist is operated by The ANVIL Group, in partnership with Seven Corners.

ASPE Assist services will augment the health benefits that are concurrently provided through the Accident and Sickness Program for Exchanges (ASPE) plan administered by Seven Corners. Grantees needing assistance with medical and dental services should continue to contact Seven Corners.

ASPE Assist is accessible 24 hours a day and is available to provide support to Exchange Participants, including grantees on the Fulbright Visiting Scholar Program, in urgent and non-urgent situations, including identification and referral of mental health conditions requiring in-person or Telemedicine treatment, and crisis intervention. The medical staff responding to grantee calls are trained to handle serious situations such as sexual assaults and mental health crises. They can also provide medical advice.

When contacting ASPE Assist for the first time, please be prepared to provide your full name, ID card number, program name (Fulbright Visiting Scholar Scholar), and your host country. This information will allow ANVIL staff to verify your status as a Fulbright Visiting Scholar grantee with the ASPE Health Benefits Plan.

ASPE Assist 24/7 Contact Information

24/7 Telephone Hotline: +1-813-963-1269

Worldwide: +44-20-3859-4463

Email: ASPEAssist@anvilgroup.com

### Going to the Doctor

If you require medical attention during your grant, you must find a physician within the ASPE policy directory and make an appointment. To identify a participating physician or facility, use the online health care provider directory at [www.usdos.sevencorners.com](http://www.usdos.sevencorners.com) (click on “First Health Provider Search” in the toolbar on the right side of the screen). Choose a physician based on the area of specialized medicine and/or the proximity of the office to your residence or campus.

At the time of your appointment, take your photo identification, ASPE identification card, a claim form and the *Your ASPE Guide to Health Care Coverage* with you. You can download a claim form from [www.usdos.sevencorners.com](http://www.usdos.sevencorners.com) (click on “Forms” in the toolbar on the right side of the screen). The doctor’s office or hospital you choose will help you fill out the form. They will advise whether you should pay for the care at the time of your visit and be reimbursed later by Seven Corners, or have the doctor’s office or hospital submit the bill to the claims administrator for reimbursement.

**You should visit a hospital emergency room only when there is a serious or life-threatening condition that requires immediate medical attention, as ASPE will not cover emergency room**



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**expenses for non-emergency situations.** If you are hospitalized for a serious medical condition, contact IIE/CIES as soon as possible.

### Amount of Coverage

You will pay a portion of the expenses for each illness or medical emergency; this portion is called the co-pay. Under ASPE, the co-pay is \$25 per accident or illness. The ASPE policy will pay the rest of the expense incurred up to a certain amount for each illness or injury sustained. Please refer to *Your ASPE Guide to Health Care Coverage* for specific details. If you have another health insurance provider, the ASPE policy pays benefits after your other policy has paid its full benefits.

### Prescription Medication

If you require maintenance medications, you are strongly encouraged to research the availability of these medications in the United States. Due to regulations regarding controlled substances and/or prescription medications, drugs available in your home country may not be available in the United States and vice versa. If you have any questions as to whether a specific medication may be brought into the United States, please contact the U.S. Food and Drug Administration at (1-888-463-6332, or at <https://www.fda.gov/>).

If you are here for more than 60 days and need your medication sent to you, ask your physician in your home country to write a letter explaining:

- You are undergoing medical treatment, and s/he has prescribed the medication for your use;
- Your country of citizenship; and,
- You are in the United States temporarily on a Fulbright grant and need a prescription refill.

Please note that while the package is addressed to you, the letter should be addressed to the customs officer and written in English. This letter along with a copy of your passport must be included in the package containing your medication. The package could be detained for up to 30 days by Customs for examination. Please send the package using a courier service such as FedEx or DHL that offers package tracking. Consult with your courier on how best to identify the package, so that the U.S. customs officer will be able to process your package properly.

ASPE is not intended to replace insurance you may already have. If you want coverage for situations or conditions that are not covered by ASPE, you should keep any private insurance you may already have, purchase coverage through some other plan or both. If you choose to maintain an existing plan or purchase another policy, you will not be reimbursed for this expense.

Your Fulbright grant includes ASPE health benefits for the grant period only. You must purchase insurance for yourself any time that you are in the United States before or after the grant period, anytime that you are outside the United States during your grant period and for your accompanying dependents for the

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duration of their stay in the United States. See [Section 12](#) for details on obtaining insurance for dependents.

Several insurance companies offer supplemental insurance policies. For details, contact the insurance companies listed in [Sources of Dependent, Supplemental and Short-Term Insurance \(Appendix C\)](#). The Fulbright Program does not endorse any company or plan.

### **Mandatory University Insurance**

At some U.S. host universities, Fulbright Scholars and their dependents are allowed to or even required to enroll in the university insurance program. In such cases, you may be responsible for paying the premiums.

IIE/CIES requests insurance requirements when they confirm an affiliation and will inform you accordingly. The Fulbright organization in your home country will receive this information through the Institutional Reply Form (IRF).

### **Public Assistance**

Under certain U.S. federal, state, county, and local laws, J-1 Visa holders or their dependents may seem to qualify for "public assistance" (such as health insurance, subsidized housing, food assistance, and unemployment benefits). Please be aware that accepting these benefits is not permissible, may jeopardize your status as a nonimmigrant visitor in the U.S., make you eligible for deportation, and prevent you from re-entering the U.S. in the future.

## **12. Dependents**

### **Expenses**

**You are responsible for all associated costs of accompanying dependents.** This includes airfare and other travel expenses, living expenses, school costs, medical insurance and any uncovered medical bills. In some countries, the Fulbright organization may provide airfare for one dependent if the grant is eight months or more and the dependent stays in the United States **for at least 80 percent of the grant period.** Likewise, some grants include a modest dependent allowance to help offset the cost of medical insurance for family members. **These funds will not be sufficient to support your family without additional personal funds. Do not bring family members to the United States unless you are certain that you will have enough money to support them.** To apply for J-2 dependent visas ([Section 7](#)), you must show that you will be able to support them financially and provide them with adequate medical insurance coverage.

### **Medical Insurance for Dependents**

The U.S. Department of State provides you with accident and sickness coverage during your grant

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period. **However, it is your responsibility to purchase medical insurance for your J-2 dependents for the duration of their stay in the United States.**

Medical care in the United States can be extremely costly, and it is essential that your accompanying dependents are adequately insured. If your dependents do not have medical insurance for the duration of their stay in the United States, they are in violation of J Exchange Visitor visa regulations as well as the terms and conditions of the Fulbright award. This may result in termination of your grant.

Medical insurance for your dependents must meet the following guidelines as specified in the J Exchange Visitor Program regulations. At minimum, the following benefits must be provided:

- Medical coverage of at least \$100,000 per person per accident or illness,
- Repatriation of remains in the amount of \$25,000,
- Medical evacuation benefits of at least \$50,000, and,
- A deductible that does not exceed \$500.

### **Options for Coverage**

You may purchase insurance for dependents from the company of your choice, provided that the coverage meets the J visa regulations outlined above. This section provides an overview of several options for you to obtain medical insurance coverage for your accompanying dependents. You should research and compare multiple options because the costs and benefits may vary considerably.

### **Insurance Plan in Your Own Country**

You may purchase insurance for your dependents in your own country before you leave. If you do, it must:

- Be from a reputable company, either highly rated by international standards or backed by your government, and,
- Provide benefits that meet the J visa requirements. Please ensure what you submit is translated in English.

### **Insurance Coverage Through Your Host Institution**

Your dependents may be eligible for insurance coverage through your host institution's insurance plan. At many institutions, your dependents' eligibility may rely on your own enrollment in the institution insurance plan. Contact the office of international programs at your host institution for more information about this option.

### **Other Insurance Plans**

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The document, [Sources of Dependent, Supplemental and Short-Term Insurance \(Appendix C\)](#), lists many companies in the United States with health coverage plans that meet the J Exchange Visitor Program requirements. Please note that this list is for informational purposes only; it does not represent any endorsement by the Fulbright Program. It is a good idea to compare thoroughly the benefits and prices of at least two plans.

### **Dependent Insurance and Pregnancy**

Most insurance policies designed for J-2 visa holders do not cover pregnancy-related care. If an accompanying dependent could become pregnant during your grant, you should carefully review the benefits of the insurance policy you are selecting to make sure that it covers pregnancy. In order for your pregnant J2 dependent to remain with you during your Fulbright, you must provide proof of insurance that covers your dependent's prenatal care and delivery. Without such coverage, the Fulbright Program may require your pregnant dependent to depart the United States.

Some policies (see [Sources of Dependent, Supplemental and Short-Term Insurance](#)) may cover pregnancy if conception occurs during the coverage period. If your accompanying dependent is already pregnant when your grant begins, be aware that it will be very difficult for you to find an insurance policy that will cover prenatal and maternity care. If you are not able to find such a policy, you should reconsider whether your pregnant dependent will accompany you on your grant program. The Fulbright Program cannot assist you with any bills related to a dependent's pregnancy or birth of a child.

### **Schooling and Childcare**

**You are responsible for arranging any necessary schooling or childcare.** Prior to your arrival, it is important to research local schools. Neither the U.S Department of State nor IIE/CIES can assist you financially. If any members of your family plan to attend school or study at a university in the United States, be sure to bring their academic records, including any documents that indicate their English proficiency, with you. You must have a birth certificate or other proof of age for any child who will be entering school.

You must also have immunization records for any child who will enroll in elementary school, secondary school, college or university. The records must show proof of the following immunizations and tests, indicating specific dates:

- Results of the PPD or Tyne test for tuberculosis,
- Diphtheria/pertussis/tetanus,
- Measles,
- Mumps,
- Polio,

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- Rubella, and,
- Chicken pox.

Most U.S. school systems also require a physical examination. You are encouraged to have your children immunized in your home country and bring their complete medical history with you to the United States. Typically, public schools are not available for children under the age of five.

If your spouse or another adult will not be accompanying you to care for your children, you will have to make other childcare arrangements, such as a privately-run daycare center or preschool, or an individual who can provide childcare services in his/her home. Childcare for young children is in high demand and can be very expensive in the United States. Scholars who require these services should inquire about the availability and cost of these services before arriving in the United States. There may be a childcare center on your university campus, which provides discounts to individuals affiliated with the institution. **IIE/CIES cannot assist you with enrolling your children in school or childcare.**

Please note that child welfare and childcare laws vary from state to state and may be different from those of your home country. Information on this topic and specific state statutes may be found on the Administration for Children and Family's website at [www.acf.hhs.gov](http://www.acf.hhs.gov).

### **Employment for J-2 Dependents**

After coming to the United States, your dependents who are J-2 visa holders may apply to U.S. Citizenship and Immigration Services (USCIS) for permission to accept paid employment.

Dependents must have permission from USCIS before they are able to apply for a Social Security Number (SSN) and to begin working. **IIE/CIES cannot assist in this process.** Obtaining USCIS' work authorization for your dependents is not guaranteed.

USCIS will not authorize employment for a J-2 dependent if you indicate that you need this income to support the J-1 visa holder. Your dependent's income is subject to federal income, state income and Social Security taxes. USCIS employment authorization for J-2 dependents remains valid only for the duration of the J-1 program at the time of application.

To request permission for dependents to accept employment, complete USCIS Form I-765 (Application for Employment Authorization), which is available online at [www.uscis.gov](http://www.uscis.gov). Mail it with supporting documents and a check to the USCIS Service Center that has jurisdiction in your place of residence in the United States. You may find the mailing address of your local USCIS Service Center in the USCIS Instructions for I-765. Please note that processing time for this request is approximately 3-4 months.

## Part II: Preparing to Leave for the United States

### 13. What to Bring

#### Essentials

In addition to clothing and other personal items, you should bring the following:

- Passport(s) and DS-2019(s) for you and any accompanying J-2 dependents.
- Your signed grant Terms and Conditions.
- Grant materials provided by your Fulbright organization in your home country or by IIE/CIES.
- A birth certificate or official document stating the date of your birth if your date of birth is not shown on your passport. You must have this proof to obtain a Social Security Number (SSN).
  - Birth certificate(s) or other official document(s) stating the date of birth for children who will be enrolling in school ([Section 12](#)).
- Medical, dental and academic records ([Section 12](#)) of any dependents who will be enrolling in school.
- A supply of medications for pre-existing medical conditions. Prescriptions from abroad cannot be filled in the United States.
- A physician's description of any prescribed medications. With this, you may consult a U.S. physician for a prescription, which you can then have filled in the United States.
- An extra pair of eyeglasses or sufficient contact lenses.
- Your SSN card or an Individual Taxpayer Identification Number (ITIN) if you were issued one during a previous visit to the United States ([Section 17](#)).
- If available, travelers' checks and/or U.S. currency.
- Credit or debit cards. You might have difficulty applying for credit cards while you are in the United States.
- Your driver's license or international driver's license, if you plan to drive in the United States.

#### Other Useful Items

You may also wish to bring these items with you:

- Copies of your curriculum vitae.
- Reprints of professional articles that you have written.
- Personal computer.

## Part II: Preparing to Leave for the United States

- Slides, photographs and maps of your country, which can be used in informal talks you may be invited to give.
- Small, inexpensive souvenirs, such as craft items from your country, to use as welcome gifts for colleagues and hosts.
- Adapters and converters that render your personal appliances compatible with the 110-volt electrical current used in the United States.

It is not necessary to bring most household items, such as linens and cooking utensils; these items can be purchased in the United States at a reasonable cost.

### 14. Communication with Faculty Associate

The primary point of contact at your host institution is referred to as your faculty associate (FA). This will generally be a faculty member in your field who was identified during the affiliation process. The faculty associate is an academic colleague who helps you with professional matters and provides information about relevant activities both on and off campus.

Affiliations at a U.S. university usually include use of the library, consultation with faculty and limited auditing of courses. However, access to university facilities varies from campus to campus. You should request more detailed information about the facilities that will be available for your use on campus from your faculty associate.

Private office space and computers are often not available. While it is likely that you will have access to computer laboratories at your host institution, you should not assume that a computer will be available for your private use. If a computer is necessary for your work and you do not wish to share one, you should be prepared to rent or buy a computer, using your professional allowance and/or personal funds.

The affiliation has been arranged for you to carry out the project outlined in your Fulbright application. You must get approval from IIE/CIES before making any substantial changes to your grant.

## Part III: When You Arrive in the United States

15. Arriving at a U.S. Port of Entry: What an Exchange Visitor Can Expect
16. Settling In
17. Obtaining a Social Security Number or an Individual Taxpayer Identification Number
18. Grant Payments
19. Banking



## Part III: When You Arrive in the United States

### 15. Arriving at a U.S. Port of Entry: What an Exchange Visitor Can Expect

#### Arriving at the Port of Entry

Have the following documents available for presentation:

- Your passport with J-1 visa,
- Your Original Form DS-2019 (NOT a scan),
- A Customs Declaration Form (CF-6059), and,
- A copy of your Fulbright Terms and Conditions.

#### Completing the Necessary Documents

**Customs Declaration Forms:** When arriving in the United States, U.S. Customs and Border Protection (CBP) officers will distribute Customs Declaration Forms (CF-6059). If arriving by air, the forms are provided by the airline on the plane. See [Appendix B](#), Summary of U.S. Customs and Regulations.

All visitors entering the United States must state their reason for entering the country. **It is important that you tell the CBP officer that you are an exchange visitor. The CBP officer may ask you questions about the purpose of your trip, how long you will be in the United States and residence abroad.** As part of the U.S. Department of Homeland Security US-VISIT Program, you are subject to being photographed and fingerprinted by a CBP officer. The officer may send you to a second inspection area for further review or issuance of additional documentation. The secondary inspection area allows inspectors to verify information. While it is unlikely, in the event that the CBP officer needs to verify your admission/participation with your sponsor, **it is strongly recommended that you have the name and telephone number of your IIE/CIES contact available.**

CBP verifies your non-immigrant status and confirms legal entry into the United States. The CBP officer will advise when you must leave the United States, writing in your passport or on your Form I-94, either a date or "D/S" (duration of status). If duration of status is indicated, you may remain in the United States as long as you pursue authorized grant activities (effective through the end date on your DS-2019). Travel documentation should be annotated "J-1 D/S"; your dependents' should be annotated "J-2 D/S." If you notice any inaccuracy, please notify the CBP officer immediately.

#### Form I-94 (Arrival-Departure Record)

**If travelling by land**, the CBP officer keeps the arrival portion of the Form I-94 and returns the endorsed departure portion to you. Keep the original stapled in your passport. Once you arrive at your

## Part III: When You Arrive in the United States

destination, make a copy to carry with you at all times for the duration of your grant. **When you leave the United States, you must return the original departure portion of the Form I-94 to the CBP officer.** Turning in the I-94 when you leave the country proves that you did not violate U.S. law by staying in the country past your authorized grant end date. Proof that you are willing to obey U.S. immigration law will be very important if you want to return to the United States in the future. Arrival-Departure Record Forms (I-94) must also be completed to match your passport, visa and DS-2019 and should reflect the address where you will live, not the address of the program. If you do not have a permanent address, you should indicate a short-term address, for example a hotel address or your faculty associate's work address.

### Land Arrival Record (I-94)

Departure Number  
980934837 07

Immigration and  
Naturalization Service  
I-94  
Departure Record

Family Name	
First (Given) Name	Birth Date (Day-Mo-Yr)
Country of Citizenship	

See Other Side

STAPLE HERE

U.S. Customs and Border Protection  
Securing America's Borders

OMB No. 1561-0111  
Expiration Date: 05/31/2015

Most Recent I-94

Admission (I-94) Record Number: [REDACTED]  
Most Recent Date of Entry: [REDACTED]  
Class of Admission: J1  
Admit Until Date: D15

Details provided on the I-94 information form:

Last(Surname): [REDACTED]  
First (Given) Name: [REDACTED]  
Birth Date: [REDACTED]  
Passport Number: [REDACTED]  
Country of Issuance: [REDACTED]

Get Travel History

► (Effective April 28, 2015, DHS began automating the admission process. An alien lawfully admitted or paroled into the U.S. is no longer required to be in possession of a printed Form I-94. A record of admission printed from the CBP website constitutes a hard record of admission. See 8 CFR § 1.104.)

► An employer, local, state or federal agency requests admission information, present your admission (I-94) number along with any additional required documents requested by that employer or agency.

► Note: For security reasons, we recommend that you close your browser after you have finished retrieving your I-94 number.

For inquiries or assistance regarding your I-94, please click here.  
Accessibility | Privacy Policy

**If travelling by air or sea, you will not receive a hard-copy I-94 card.** In this case, your arrival and departure information will be automatically recorded electronically and available for review at <https://i94.cbp.dhs.gov/i94/#/recent-search>.

CBP officers will only stamp your passport and any accompanying dependents' passports with the date of admission, class of admission and a hand-written admitted until date. Please visit <https://i94.cbp.dhs.gov/i94/#/recent-search> should you be required to provide your admission record information.

### Air or Sea Arrival-Departure Record Form (I-94)

If your issued Form I-94 is lost, stolen or mutilated, you must apply for a replacement through U.S. Citizenship

and Immigration Services (USCIS) using Form I-102 (Application for Replacement/Initial Nonimmigrant Arrival/Departure Record). You can download Form I-102 from the USCIS website at <https://www.uscis.gov/i-102>. **There is a \$445 fee to replace a Form I-94. IIE/CIES cannot reimburse you for this cost.**

### Other Arrival Procedures

Failure to comply with U.S. government entry-exit procedures may result in denial of entry to the United States. In some instances, the CBP officer will issue Form I-515A ("Notice to Student or Exchange Visitor"), which authorizes a temporary 30-day admission into the United States if you have not provided all required documentation to support your entry on your J-1 visa. **You must inform your IIE/CIES contact immediately if you are issued an I-515A and it is your responsibility to submit required documentation to CPB within seven business day.**

## Part III: When You Arrive in the United States

### 16. Settling In

The checklist below will help you prioritize what you need to do upon arrival in the United States:

- Open a bank account: If your stipend will be paid by IIE/CIES, you'll likely need to open a bank account and register for [IlePay \(Section 18 and Section 19\)](#) in order to electronically receive your payments.
- Inform IIE/CIES and your faculty associate of your arrival. **Please note that IIE/CIES cannot process your arrival documentation before the start date indicated in section three of your Form DS-2019. Within 10 days of your arrival, you must complete and return to IIE/CIES the Notification of Arrival Form, along with supporting documents** requested on the form provided by your contact at IIE/CIES, so that your status as a J-1 Exchange Visitor can be validated in Student and Exchange Visitor Information System (SEVIS). These documents should be uploaded through the [Self-Service Portal](#). You must obtain the signature of your faculty associate or university personnel (e.g. student or scholar advisor from the international office, department administrator, etc.) to confirm your arrival and program participation. **Do not wait until you have a permanent address to send in this form.** When you move to a permanent residence, make sure to inform IIE/CIES by updating your physical and mailing address in the [Self-Service portal](#). **If dependents are accompanying, you must provide information about their J-visa compliant insurance coverage. You may be asked at any time by IIE/CIES to show proof of this coverage.** The Fulbright program also requires at this time for you to submit a signed copy of your Form W-8 Ben.
- Apply for a Social Security Number or Individual Taxpayer Identification Number ([Section 17](#)).
- Locate long-term housing ([Section 10](#)).
- Inquire about renter's insurance ([Section 10](#)).
- Notify IIE/CIES of your Social Security Number through the [Self-Service Portal \(Section 17\)](#)
- Identify a doctor, dentist and hospital in case of emergency within the [ASPE policy directory](#).
- Obtain gas, electricity, water and telephone service as needed.
- Research schooling options for accompanying children.
- If you bring or purchase a car, obtain a driver's license, vehicle registration and insurance ([Section 10](#)).

## Part III: When You Arrive in the United States

### 17. Obtaining a Social Security Number (SSN)/Individual Taxpayer ID Number (ITIN)

Every individual who receives income in the United States is identified by either a Social Security Number (SSN) or an Individual Taxpayer Identification Number (ITIN). These are unique personal identification numbers and are widely used in the United States. If you receive income from IIE/CIES or another U.S. source, you must obtain either an SSN or an ITIN. The Fulbright Program strongly encourages Fulbright Scholars to apply for an SSN or ITIN, and once issued, these numbers are good for life and can assist with future needs.

#### Primary Purposes of the Social Security Number or the Individual Taxpayer Identification Number

- Tax-related matters including filing of U.S. and state income tax returns, receiving benefits under an income tax treaty and claiming tax refunds. If you do not have a number, tax returns will not be accepted and refunds will not be issued.
- Having IIE/CIES withhold U.S. income tax from your stipends and getting the withheld funds properly credited to your tax account.
- Participation in professional and personal enrichments activities, such as the Outreach Lecturing Fund).
- Opening an account at most banks.
- Rental applications for housing, installment of utilities services and a situation in which a credit check is required.
- Use by the U.S. based organization that pays you. Many organizations use the Social Security number as a personal identification number for generating stipend and reimbursement checks.
- Obtaining a driver's license, in some states.
- University records and access to campus services.

#### Applying for a Social Security Number

Before you are eligible to apply for an SSN, you must ensure that the [Notification of Arrival Form](#) and supporting documents have been received and processed by IIE/CIES. ( [See section 16](#)—your advisor will also be in communication with you about the Notification of Arrival form and associated documents.) Once we have validated your arrival, IIE/CIES will issue a Social Security Administration letter of support, which you'll need to apply for your SSN.

To apply for a Social Security number, you must go in person to the Social Security Administration Office (SSA). To locate a nearby Social Security office, consult the SSA website at <https://secure.ssa.gov/ICON/main.jsp> or call (800) 461-0430. **IIE/CIES cannot assist in the application process to obtain a Social Security number.**

## Part III: When You Arrive in the United States

Take the following documents to the office:

- [Form SS-5](#) (Application for a Social Security Card),
- Your passport (or other official document indicating your date of birth),
- Form DS-2019,
- Form I-94, and
- Social Security Administration letter of support from IIE/CIES (sent to the mailing address we have on file for you). Always keep your addresses up to date through the [self-service portal](#)).

If you were admitted by air or sea and were not issued a Form I-94, please visit <https://i94.cbp.dhs.gov/i94/#/home> to request your electronic admission record information.

When completing [Form SS-5](#), note that **it is extremely important that you write your name on your application exactly as it appears on your passport**. Also, question three asks for your citizenship status. You should indicate "Legal Alien Allowed to Work."

**Notify IIE/CIES of your number by the [self-service portal](#) as soon as you receive it, along with any applicable completed tax forms ([Section 24](#)).**

If you were issued an SSN during a previous stay in the United States, bring your Social Security card with you to the United States.

### Applying for a Duplicate or Replacement SSN

If you were previously issued an SSN, but have lost the card or no longer know the number, you must complete [Form SS-5](#) to request a duplicate card. When you fill in the form, you must check "yes" in item 10 to indicate that you have already filed for or received a Social Security card. If you know the number and the name on the card you were issued previously, you should list them in items 11 and 12. Then follow the instructions as you would to apply for an original card. Your duplicate card will have the same name and number as your previous card. For more information on replacing a lost card, visit <https://www.ssa.gov/ssnumber/>.

### Applying for a Corrected SSN

If the spelling of your name on your previously issued SSN card differs significantly from that of your current passport, you may want to apply for a new SSN card with the updated spelling. In order to do this, submit [Form SS-5](#) as if you were applying for a lost card, along with a document showing the spelling of your old name (original SSN card) and one with the new spelling (e.g., passport). Your corrected card will have your new name and the same number as your previously issued card. For more information on obtaining a corrected card, see <https://www.ssa.gov/ssnumber/>.

## Part III: When You Arrive in the United States

### Applying for an Individual Taxpayer Identification Number (ITIN)

If your local Social Security office will not accept your application for a Social Security Number, you should request a letter of rejection. You will then need to obtain an ITIN from the Internal Revenue Service (IRS). If you have been issued an SSN, you cannot apply for an ITIN.

To apply for an ITIN, you should go to your local IRS office and complete Form W-7, Application for IRS Individual Taxpayer Identification Number.

The form is available online at <http://www.irs.gov/pub/irs-pdf/fw7.pdf>. To locate your IRS Taxpayer Assistance Center, consult their website at [http://www.irs.gov/uac/TAC- Locations-Where-In-Person-Document-Verification-is-Provided](http://www.irs.gov/uac/TAC-Locations-Where-In-Person-Document-Verification-is-Provided). You will need to take with you the same documentation that is required to obtain a SSN and your letter of rejection for a Social Security Number. Once you have received your ITIN, you must report it to IIE/CIES via the [self-service portal](#).

### 18. Scam and Fraud Awareness

There are a number of different scams that you need to be aware of during your time in the United States. Scams are deceptive or fraudulent contact (normally through email or phone call) that normally seek to steal your personal information. Personal information can include your bank account number, SSN number, birthdate, and other items. It's very important that you do not provide any personal information over email or in response to a call phone you receive. Some of the scams we've heard of in recent years are:

- Calls from people saying they represent the IRS. They normally state that you owe them money and if you don't comply, you will be arrested.
- Emails or calls that threaten you by saying they have incriminating pictures or information about you that they will disseminate unless you provide them with money.
- Emails saying you've won a contest or asking you to apply for a grant/award. You then are asked to provide personal information.
- Housing scams are also very popular. Someone acting as a landlord asks you to pay a security deposit, often without a lease, and then evicts you from the property and refuses to return your deposit. Without having a lease, it can be very difficult to recover funds.

Here are some resources that may be helpful: - <https://www.irs.gov/newsroom/tax-scams-consumer-alerts> - <https://www.fbi.gov/scams-and-safety> - <https://www.usa.gov/common-scams-frauds> - <https://www.consumer.ftc.gov/articles/0208-phone-scams> If you receive an email or phone call and are unsure as to if it is a scam, please do not hesitate to reach out to your Fulbright advisor.

## Part III: When You Arrive in the United States

### 19. Grant Payments

If your grant was issued by the Fulbright office in your home country, consult with them about your payment schedule.

If your grant was issued by IIE/CIES, the first payment will include the first three months of your monthly stipend and any allowances reflected in your Terms and Conditions ([section 5](#)).

Scholars who are paid by IIE/CIES receive electronic grant payments every three months from the beginning of their grant. **You will not receive an actual check.** To receive your stipend payments, you **must** take the following steps:

1. Open a U.S. bank account (checking) when you arrive in the U.S. IIE recommends that, when you go to open an account, you confirm with a bank representative that Zelle payments are accepted and if there are limitations or fees associated with Zelle payments. Some U.S. financial institutions do not work with the Zelle service, have monetary limits, or charge fees associated with Zelle payments.
2. Log into your bank account online and confirm that you can access it. Some banks may require you to reset your password the first time you log in. You must do this before you follow the next steps.
3. Visit the [Zelle](#) website to register with IiePay, using your primary email associated with your Fulbright Program (the same email you use to log into the [self-service portal](#))
4. You will receive an email from Bank of America ([payments@ealerts.bankofamerica.com](mailto:payments@ealerts.bankofamerica.com)) on your official Fulbright program start date. You must open a U.S. bank account and register for IiePAY within 14 days of receiving this email to receive the first payment. Once registered, your first payment will be available to you.
5. You can find more detailed guidance and troubleshooting information on our website [About IiePay](#).

**Please note that after the first payment, no additional payment will be issued until IIE/CIES has received a copy of your social security card (or confirmation that you have applied for one), and applicable tax form (W8-BEN, [Section 25](#)).**

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If a payment does not appear in your bank account by the scheduled date, please first confirm with your bank that the payment is not in process. If it is not being processed, please inform IIE/CIES.

### 20. General Banking

In the United States, many purchases are made by debit or credit card. When you open your bank account and enroll in IiePay and Zelle as described above or at this [link](#), you should also be able to obtain at least a debit card at that time. When you are speaking with a bank representative about opening an account, you can also inquire about the possibility of obtaining a credit or debit card. IIE/CIES recommends that you call or visit several banks to determine the variations in their services and charges before opening an account. *When comparing banks and services, ask about the documents they require and whether you must maintain a minimum balance to avoid service charges. One difficulty some Fulbrighters experience is that some banks require a Social Security Number or ITIN to open account, while others do not. This is a question you can ask of banks initially to save yourself frustration if you do not yet have a Social Security Number or ITIN.* Please

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## Part III: When You Arrive in the United States

be aware that it can sometimes take up to 10 business days for a check to be processed, especially those for large sums of money. During this time, you will not be able to withdraw deposited funds from your account. If you make any changes to your bank account, please be sure to notify your IIE/CIES contact to ensure there are no disruptions to your grant payments.



## Part IV: During Your Grant Period

21. The Role of IIE/CIES
22. Professional and Personal Enrichment Activities
23. Additional U.S. Source Income
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25. Tax Matters
26. Fulbright Foreign Scholarship Board Grant Termination Policy

## Part IV: During Your Grant Period

### 21. The Role of IIE/CIES

During your stay in the United States, IIE/CIES will be available to assist you whenever possible. A list of IIE/CIES contacts may be found on the website at <http://www.cies.org/program-advisors>. If you have any questions regarding program policies, please contact your IIE/CIES program advisor or explore the visiting grantee website further.

**Per United States Citizenship and Immigration Services (USCIS) regulations, you are required to notify IIE/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, pregnancy or the birth of a child,
- Any international travel, and,
- Plans for departure from the United States.

You must also inform IIE/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 (which is not guaranteed) from the U.S. Department of State through IIE/CIES in advance of making arrangements for any of the following:

- Supplemental U.S. Funding and Honoraria ([Section 24](#)),
- Extension of stay ([Section 29](#)), and
- Transfer of sponsorship ([Section 29](#)).

Additionally, please share with IIE/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.

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### 22. Professional and Personal Enrichment Activities

IIE/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.

On behalf of the U.S. Department of State, IIE/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/program/enrichment> for additional information and to read about past scholar activities on our [Fulbright Scholar Blog](#).

Scholars whose dates align with the enrichment seminar schedule will receive an invitation to *apply* to attend one of several visiting scholar seminars scheduled throughout the academic year. We have a limited number spaces in each seminar, and first priority will go to scholars who do not have access to Anchor Cities programming on the East and West Coasts. 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. **Note: Participating in the any Fulbright Enrichment program is a grant benefit and any funding spent on your behalf in support of such events is taxable as income.** Please keep this in mind, particularly if you are paid by an international Fulbright Commission, as this may be the only income that would require you to file a U.S. tax return. Of course, the benefits of participating in enrichment activities are far greater than the minor inconvenience of having to file taxes, but please be aware of this implication prior to accepting to participate in OLF. **Reminder: One of the ways to make filing your taxes as easy as possible is to apply for a Social Security Number or an International Tax ID number while you are in the U.S. on your Fulbright grant.** These numbers are good for life and worth the investment of your time both for participating in this current Fulbright program but also for any future visit you may take to the United States.

For other opportunities, *The Chronicle of Higher Education* offers a comprehensive list of academic meetings and conferences that you may choose to pursue at your own expense. You can find *The Chronicle* in your university library or at [www.chronicle.com](http://www.chronicle.com).

### 23. Outreach Lecturing Fund

[The Outreach Lecturing Fund \(OLF\)](#) provides funding for U.S. institutions to host Fulbright Visiting Scholars, already in the United States, for short-term speaking engagements. The OLF travel award is designed to enrich U.S. institutions through lectures that will promote discussion on academic disciplines and cultural

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understanding. The OLF seeks to build relationships and partnerships with institutions that are underrepresented within the Fulbright Program as a means to promote future engagement with Fulbright. Priority Institutions include: Minority Serving Institutions, Community Colleges, Small Liberal Arts Colleges, Women's Colleges and Art Colleges, and geographically underrepresented institutions. Every OLF visit **must** include at least one trip to one of these types of institutions. Please keep in mind that every application submitted by hosting institutions will be reviewed and is not guaranteed funding.

Fulbright Visiting Scholars whose grant length exceeds three months are strongly encouraged to maximize the impact of her/his exchange experience by giving lectures to various U.S. audiences of higher education. While official OLF applications must be submitted and driven by hosting institutions, Visiting Scholars are encouraged to proactively explore potential OLF visits. One place to start is with the list of [Priority Institutions](#). Please note however that it is the role of the hosting institutions to reach out to IIE/CIES with any questions about the application process.

**Please note:** Scholars will not receive funding for trips to meet with colleagues and friends in other parts of the United States, or to attend conferences. However, if scholars wish to attend conferences, we encourage you to find a nearby **Priority Institution** for a guest lecturing opportunity to be in compliance with the Outreach Lecturing Fund's eligibility requirements.

**General Eligibility:** The applications for OLF awards must be submitted, **by the hosting institution**, at least one month prior to proposed lecture. The scholar must be on a grant of at least three months, and cannot participate in an OLF award within the last 30 days of their Fulbright Grant. Scholars wishing to participate in an OLF award must have a valid SSN or ITIN at the time of application. In order to receive payment, scholars must submit a copy of their SSN or ITIN card through the [self-service portal](#). OLF hosting institutions must be at least 75 miles away from the scholar's primary host institution to qualify for an OLF award. **Note: Participating in the OLF program is a grant benefit and is taxable as income.** Please keep this in mind, particularly if you are paid by an international Fulbright Commission, as this may be the only income that would require you to file a U.S. tax return. Of course, the benefits of participating in OLF are far greater than the minor inconvenience of having to file taxes, but please be aware of this implication prior to accepting to participate in OLF.

All OLF applications must be approved by IIE/CIES prior to the date of the lecture. To apply, U.S. institutions must submit the following through our [online application system](#) at least 30 days prior to your trip:

- A formal letter of invitation for you to give a presentation or guest lecture at their institution with date, time and location of the event. If your host institution is offering you an honorarium, please make sure they include this amount in that letter of invitation.
- A letter signed by you and your faculty associate host at your primary institution explaining how undertaking this OLF activity would enhance your Fulbright project. This letter should also indicate your primary host's support of your participation and approving any honoraria that may have been

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offered by your OLF host institution. *This letter is critical for you to remain in compliance with J1 regulations, so please assist your OLF institution with providing this letter.*

- A completed OLF Application (found [here](#)).

The OLF is a **travel grant** that encourages cost sharing from hosting institutions. OLF host institutions are ultimately responsible for additional expenses including local transportation, lodging/accommodations, and meals. In the event that hosting institutions pay for these expenses directly (which is the encouraged practice), there is no need to receive prior approval from IIE/CIES. Overall awards for OLF travel are calculated using a sample itinerary from an online travel site. The price quote is rounded up to the nearest \$100 and then given an additional fixed amount, in order to help offset ground transportation costs to and from the airport. Trips of less than 75 miles are typically not eligible for OLF funding.

However, if institutions reimburse Visiting Scholars for expenses or offer a separate honorarium, prior approval from IIE/CIES is required due to J-1 visa regulations and **must** be handled at the time of the institution's application. Host institutions may reach out directly to [OLF@iie.org](mailto:OLF@iie.org) at any time with questions about the application process.

IIE/CIES will inform host institutions of the status of applications within two weeks of submission. Approval emails will include a link to the online Evaluation Form, which must be completed by hosting institutions within three days of the OLF visit. Scholars are responsible for submitting their SSN or ITIN through the [self-service portal](#) (Section 17), and complete registration for [IlePay](#). Provided the SSN or ITIN and EFT information is submitted in a timely fashion, the pre-determined travel award payment will be processed within four weeks of receipt of the evaluation.

Please visit the OLF website at <http://www.cies.org/program/outreach-lecturing-fund> for additional details and to refer potential hosting institutions to the online application. Hosting institutions may direct all OLF related questions to [OLF@iie.org](mailto:OLF@iie.org).

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## 24. Other Non-IIE/CIES Opportunities and Resources:

### Global Ties U.S.

IIE/CIES is a member of Global Ties U.S., 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 Global Ties U.S. and its affiliates offer in more than 100 cities and towns by calling [202.842.1414](tel:202.842.1414) or by [visiting www.globaltiesus.org](http://www.globaltiesus.org).

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IIE/CIES encourages you to take advantage of Global Ties resources and to 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 370,000 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 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 about the diversity of America and to

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meet and share ideas with U.S. Fulbright alumni. To see if there is a Fulbright Association chapter in your vicinity, refer to the website: [www.fulbright.org](http://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](http://www.facebook.com/Fulbright)), and YouTube ([www.youtube.com/fulbrightprogram](http://www.youtube.com/fulbrightprogram)) and Vimeo (<http://vimeo.com/fulbright>) channels. You can also follow the Fulbright Program's Twitter feed (<https://twitter.com/FulbrightPrgrm>). 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.

## 25. Additional U.S.-Source Income

### Supplemental U.S. Funding and Honoraria

As a researcher or lecturer holding a J-1 visa, you are eligible to accept supplemental funding in the form of travel reimbursement\* or honoraria if:

1. it is consistent with the Fulbright Program's purpose;
2. if it is related to your project; and
3. if you obtain pre-approval through IIE.

Such funding opportunities must be approved **in advance** by the U.S. Department of State, and retroactive

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requests cannot be considered). Please note that the U.S. Department of State will not approve requests that would delay the end date of the grant period or that are intended for the sole purpose of supporting your dependents. Stipend supplements, ongoing lecturing and consulting opportunities are considered supplemental when you receive funds in excess of your grant. You must report any payment received as income on your tax return.

\*Please note that if the institution inviting you to lecture, for example, can pay your travel costs directly to the hotel or airlines rather than reimbursing you, then pre-approval is required only for the activity itself and not the funding. It is strongly encouraged that you inquire with the inviting institution if such an arrangement is possible.

**In order to obtain approval to accept wages or income, you must submit the following letters to IIE/CIES at least 30 days before the intended activity will begin:**

- A letter from the institution that is offering you the supplemental funding 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 and supporting the activity and explaining how it would enhance your program.
- A letter from you indicating why you are interested in undertaking the 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.

IIE/CIES will then forward the request to the U.S. Department of State for approval. You will receive a written response from IIE/CIES through the self-service portal once a decision has been made. **You may not engage in any activity which provides supplemental funding without the pre-approval of the U.S. Department of State.**

## 26. Traveling Outside the United States During Your Grant Period

### Covid-19 Guidance on Travel

Since March 2020 the Fulbright Program has strongly recommended against any non-essential travel by Fulbright participants, both within the United States and internationally. Many U.S. states and foreign governments have adopted extraordinary measures to restrict movements across borders in an effort to contain the spread of COVID-19, and this situation continues to evolve. Therefore, conditions for future travel may become more challenging without notice, including the reduced availability of air tickets, closed borders, and heightened requirements for quarantine.

Unexpected changes may have an impact on your Fulbright Program, so if you choose to travel outside of your U.S. host campus community at any point in your program, please be aware of the following:



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- Per J-visa regulations, you are required to participate in your Fulbright Program in the community where your U.S. host institution or post-degree academic training provider is located.
- You may/will be responsible for the cost of any COVID testing required for travel.
- **If you are unable to return to your U.S. host community to continue in your Fulbright Program activities you may risk the continuation of your academic studies, research, or training due to loss of Fulbright funding, university funding, or J-visa sponsorship.**
- You may be required to quarantine at your destination and/or upon return to your U.S. host community for up to 14 days in each location.
- Transportation, including flights, may be unexpectedly delayed or cancelled.
- You will be responsible for any additional costs incurred because your domestic or international travel is delayed or cancelled.

If you decide to travel, you must take the following actions prior to any travel.

- Report your travel plans to IIE's self-service portal ([connect.iie.org](https://connect.iie.org)). This is a requirement of your J-1 visa.
- Stay updated on any changes to your U.S. host institution's academic calendar.
- Research the travel guidance from the Centers for Disease Control and Prevention (CDC); federal, state, and local government officials; host university officials; and airlines.
- Comply with all COVID-19 testing or quarantine requirements prior to travel to or transit through another country and upon return to your U.S. host community.
- You must notify your IIE advisor if you are required to self-quarantine.
- Review the Travel Information section that follows to confirm you fulfill all re-entry requirements.

### International Travel

If you must travel outside the United States, please note the following regulations that apply to international travel DURING the grant period (international during the pre- and post-program 30-day grace periods are not allowed):

- **You must notify your IIE/CIES contact person through the [Self-Service Portal](#) at least three weeks before any international travel.** Indicate your planned travel dates, destinations, and information on how to contact you abroad.
- You must have your DS-2019 signed for international travel by IIE/CIES prior to departure/reentry. To complete this step, before travel, **you must mail your original DS-2019 (and any dependents' DS-2019s) to IIE/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 an IIE/CIES representative can sign your DS-2019; the international office at your host institution cannot. **You must have this signature on your DS-2019 to re-enter the United States.**
- Please mail your DS-2019(s) to:  
Institute of International Education  
Attn: Exchange Visitor Sponsorship  
One World Trade Center, 36<sup>th</sup> Floor  
New York, NY 10007

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- **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.
  - **Your DS-2019 validated for travel.** If dependents are traveling with you, each J-2 dependent's DS-2019 must be validated for travel with IIE/CIES's signature as described above.
  - **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. IIE/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. IIE/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 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 ([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

## Part IV: During Your Grant Period

was included in your initial grant proposal, please confirm with IIE/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 IIE/CIES of your international travel plans and relevance to your research or lecturing and provide a letter of support from your faculty associate. IIE/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. The [Sources of Dependent, Supplemental and Short Term Insurance \(Appendix C\)](#) lists a number of insurance providers who offer short-term insurance coverage which can be used while you are outside the United States.

### Adjustment in Stipends

If IIE/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 IIE/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 IIE/CIES program advisor, the Fulbright organization in your country and your host institution must approve such an arrangement in advance.

<b>Stipend Adjustments for Time Outside the United States</b>	
<b>Days Outside the United States</b>	<b>Stipend Reduction</b>
1-15	None
16-30*	½ month

\*Breaks in your program activity/absences from the United States of longer than 30 days are not permitted on the Fulbright Visiting Scholar Program and may result in your Fulbright exchange/J1 visa sponsorship being suspended.

## Part IV: During Your Grant Period

### 27. Income Tax Matters

Each year, in mid-April, residents and citizens of the United States are required to submit their annual income tax returns for the calendar year prior. As resident aliens of the United States, Fulbrighters are also required to participate in this annual ritual. We ask that Fulbrighters approach this piece of their exchange with a good faith effort. As tax information can be overwhelming and confusing, this guide attempts to simplify the ways in which Fulbrighter grant benefits can be subject to taxes. It also aims to orient Fulbrighters to the most common Fulbrighter tax profiles so that you may understand better how U.S. tax law may apply to you. Your IIE advisor, while not certified to give tax advice, can help you understand the components of this guide. For more complex tax matters, Fulbrighters should consult the IRS website ([irs.gov](https://www.irs.gov)) and/or a tax professional. 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.

The Fulbright Program sponsor, the United States Department of State, pre-pays federal taxes on Fulbrighter's behalfes. Therefore, a Fulbrighter should never owe federal taxes as a result of their direct Fulbright income from the U.S. Department of State/IIE. However, a Fulbrighter may be required to pay **state taxes** on their Fulbright income, and/or Fulbrighters **may owe taxes on income earned from a non-Fulbright source**.

#### Important notes:

- In ALL cases, regardless of whether or not taxes are actually owed, and whether or not your country has a tax treaty with the United States, Fulbrighters must file tax paperwork and/or a tax return to be in compliance with U.S. tax law.
- Given the U.S. academic calendar runs August through May, many Fulbrighters will need to file tax paperwork for TWO tax years. For example, if your exchange begins in August 2021 and runs through May 2022, you will have to file U.S. tax returns for both 2021 (in April 2022) and 2022 (in April 2023).

#### Make tax time easier!

Your Fulbright advisor will prompt you for information and/or encourage you to carry out tax-related tasks before, during, and after your program to ensure your tax burden is easier to meet. They include:

- Foreign Tax ID Number (This is a number from your home country and it helps us apply any tax treaties that may be applicable to your payments). You will be prompted for this information shortly after you receive your DS-2019.
- W-8 BEN Form (This short form is required by the IRS for IIE to have on file and is collected with your other arrival documents)
- SSN/ITIN: Immediately after arrival, you will be supplied with a letter in support of your application to receive a Social Security Number (SSN)/International Tax ID Number (ITIN). We encourage ALL Visiting Scholars to obtain an SSN or ITIN as they are valid for your lifetime, are required by law to appear on your tax returns.

## Part IV: During Your Grant Period

Having this number ahead of time will make filing your tax paperwork each year MUCH easier. **Take note:** If you receive any grant benefits (these benefits may be paid on your behalf and not seem to you like income) and didn't obtain your SSN or ITIN while in the U.S., you'll have to apply for an ITIN anyway at tax time. Applying for this Tax ID number from your home country is **very** inconvenient.

**If you take care of the above three items promptly, your tax time each year will be much easier!**

### Typical Taxable Fulbrighter Sources of Income:

The following sources of taxable income are typically experienced by Fulbright Visiting Scholars.

- Fulbright stipend paid directly by IIE/CIES (U.S.-sourced)
- Participation in Fulbright Enrichment Seminars and Anchor Cities programming incur taxable grant benefits paid for by IIE/CIES on the Fulbrighter's behalf.
- Receipt of an Outreach Lecturing Fund Travel or Virtual Award
- Compensation received separately from a Fulbrighter's host institution in the United States or honoraria received for a guest lecture at another institution/organization during your Fulbright (such activities must be pre-approved by Fulbright, and they do carry tax liability)
- Other types of income are less common; only you know all of your U.S. sources of income during your grant period and it is your individual responsibility to report such income on your U.S. tax returns.

### How do I know what taxable income I received in each tax year?

By late February/early March, IIE/CIES will send you the instructions and guidelines you will need to file the appropriate paperwork for your U.S.-sourced *Fulbright-related grant benefits*.

Similarly, early in each calendar year, other institutions you may have received payments from in the previous year will send you tax information separately, typically via U.S. mail. If you are uncertain, contact the source of your payments.

### What tax forms will I need to fill out?

The forms required for your individual tax return will depend on the source (U.S. or foreign) of the income you received and the U.S. state in which you received it. IIE/CIES will provide guidance on this point early in each calendar year.

### ALL Fulbright Scholars: IRS Form 8843

All Fulbright Scholars, regardless of income (U.S. or foreign source), must file Form 8843 for each tax year during which they were resident in the United States for even 1 day. This one-page form establishes presence in the United States as a non-resident alien and is required. In the case that a Fulbrighter received \$0 U.S.-sourced income this will be the only form required.

## Part IV: During Your Grant Period

### For Scholars paid by IIE/CIES: IRS Form 1040NR/ 1040NR-EZ and Sprintax

Scholars who receive their stipend income directly from IIE are provided with tax filing assistance through Sprintax. Sprintax is an online US tax preparation system for international students and scholars. You will be prompted by IIE/Sprintax at various points before, during, and after your program to provide information in service of your tax preparation and compliance. At tax filing time, Sprintax will guide you through the 1040NR tax return process and assist you with preparing compliant Federal and State tax returns. It is your responsibility to print and mail your tax returns to the U.S. International Revenue Service (IRS).

### For IIE/CIES Scholars: Why might IIE/CIES or Sprintax ask me for part or all of my tax refund?

The Fulbright Program does pre-pay your federal taxes, and therefore sometimes in the tax filing process a tax refund will be issued. In such cases, IIE/CIES or Sprintax will ask that you return the appropriate portion of the refund to the program, and if prompted it is your responsibility to do so. Sprintax will make it clear which portions of your refund are due to IIE/Fulbright, and which are due to you as an individual. In some cases, depending on your other, non-Fulbright sources of income, you may owe taxes; these are also your responsibility.

### For Scholars paid by Fulbright Offices in their home country but who accepted U.S.-sourced grant benefits from Fulbright (enrichment or travel awards)

IIE/CIES will inform any Fulbrighter who falls into this category that they received such benefits and instruct them at the appropriate time that they will need to file form 1040NR-EZ in addition to form 8843. IIE/CIES has also developed some limited resources to help with filing taxes on one's own. Scholars in this group may also choose to receive filing assistance through Sprintax at their own, modest cost.

### For scholars who receive non-Fulbright income from any other U.S. source:

Fulbrighters should obtain information about their tax obligations directly from the entity that paid them the funds.

### My home country has a tax treaty with the U.S. Why do I have to file a tax return?

While tax treaties between the United States and other countries may exempt some Fulbright Scholars from owing federal income tax, **they must still file income tax returns to claim those tax treaty benefits and/or claim any refunds.**

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. The provisions of these treaties vary and exemptions are not automatic.

**Important note:** Scholars must provide a non-U.S. tax ID, a Social Security Number, and/or an International Tax ID number to claim tax treaty benefits or be exempt from tax withholding. As referenced above, you will be prompted to supply and/or apply for these numbers prior to and/or early in your Fulbright Program.

## Part IV: During Your Grant Period

If the United States has a tax treaty with your country, you can 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](http://www.irs.gov).

### What is Tax Withholding?

Any U.S. entity paying out funds typically withholds tax payments in order to ensure that taxes are collected and paid. Fortunately, the Fulbright program covers those taxes (14%) for participants and IIE pre-pays it on your behalf, but it can still be difficult to understand the calculations. When you file a tax return, it allows the IRS to refund any overpayments, or charge any taxes due if not enough was withheld. If you receive income from any U.S. source other than IIE/CIES, you are also subject to withholding by that source.

### State Income Tax

Most of the individual states of the United States also tax the income of their residents and non-residents. 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.

So, for example, a Fulbrighter who participates in a Fulbright enrichment seminar in the state of Kansas and receives and Outreach Lecturing Fund award to travel to the state of Montana, you may owe state taxes to Kansas and Montana on those grant benefits. IIE/CIES and/or Sprintax will inform and assist you with next steps if you received such forms of taxable income through your participation in the Fulbright program.

For non-Fulbright-related income, please inquire with the provider of those funds about your state income tax obligations. 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.

### Why can't my IIE/CIES advisor answer my tax questions?

All organizations that issue grants are responsible for providing **tax documentation** to grantees and for **reporting their grant income** to the IRS. **IIE/CIES is not permitted to give tax advice.** Income tax regulations are complex and change frequently, and this is especially true as your individual income profile is unique to you and may include non-Fulbright income. Only a tax professional can provide tax advice.

IIE has compiled informal resources that may help you. If you have specific questions about your tax return after you have received tax guidance from IIE, contact your local IRS Taxpayer Assistance Center listed in the telephone directory or online, or you may use the IRS Taxpayer Services [online resources](#) (which includes calling information).

### Other Tax-related Resources

The IRS has plentiful information about tax obligations for Fulbrighters who are classified as non-resident aliens for tax purposes: <https://www.irs.gov/individuals/international-individuals>

## Part IV: During Your Grant Period

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) 829-1040 within the United States. IRS forms and publications are also available online at [www.irs.gov/formspubs/index.html](http://www.irs.gov/formspubs/index.html).

### 28. 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. Any act likely to give offense to the United States because it is contrary to the spirit of mutual understanding.
3. Failure to observe satisfactory academic or professional standards.
4. Physical or mental incapacitation.
5. Engaging in any unauthorized income-producing activity.
6. Failure to comply with the terms and conditions of the grant.
7. Material misrepresentation made by any grantee in a grant application form 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 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.



## Part V: At the End of Your Grant Period

29. Return Travel
30. Early Departures
31. Extensions and Transfers
32. Final Report and Certificate
33. Immigration Regulations
34. Health Benefits After the Grant Period
35. Continuing Fulbright Opportunities

## Part V: At the End of Your Grant Period

### 29. Return Travel

As part of your grant benefits, the Fulbright organization in your home country will either arrange your international travel or tell you how to do so. Be certain to confirm your travel arrangements well in advance of your departure. **Once your travel plans are confirmed, send your itinerary to your IIE/CIES program advisor.**

If you extend your stay, you may need to change your departure itinerary. You will be responsible for making these changes to your return travel and for any associated costs. Contact the airline that issued your original ticket to make the necessary changes.

**IIE/CIES cannot assist with any travel arrangements. You are responsible for obtaining any transit visas needed for your return travel.**

### 30. Early Departures

Notify IIE/CIES immediately if you must end your program early. Note that your ASPE benefits will end upon your early departure. If you leave the United States more than 15 days before your program end date **or** if the combined total of your early departure and any previously approved international travel exceeds 15 days, you may be responsible for reimbursing some of your grant payment.

The chart "Adjustment for Early Departure" illustrates the approximate amount you will owe if IIE/CIES administers your grant payments.

Consult with your IIE/CIES contact to determine the exact amount and payment options.

If your grant was issued by the Fulbright organization in your home country, in addition to notifying IIE/CIES, please contact them regarding reimbursement policies and procedures.

Adjustment for Early Departure	
Days Before Grant End Date	Stipend Owed to IIE/CIES
1-15	None
16-30	½ month
31-45	1 month
46-	1½ months

### 31. Extensions and Transfers

Please keep in mind that the spirit of the Fulbright Program is to increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchange. **When you have completed your grant, you are expected to return home to share the knowledge you have gained.**

## Part V: At the End of Your Grant Period

In special cases, extensions of grant length or transfers from Fulbright sponsorship may be considered, as long as it does not exceed the standard program maximum length of 12 months (including extensions). In all cases, IIE/CIES is governed by the policies of the Fulbright Foreign Scholarship Board, the U.S. Department of State, the Fulbright organization in your home country, and the policies of your home government. You must follow these policies and procedures in order to extend your grant period and continue the benefits associated with your Fulbright grant or to transfer your sponsorship to your host institution. **It is recommended that before taking steps to apply for an extension or transfer that you confirm any country-specific policies on extensions and transfers with your IIE advisor and your home country Fulbright Office.**

### Extensions

A one-time grant extension may be possible when a scholar when an exceptional opportunity arises. These extensions are not automatic and require approval by the U.S. Department of State, the Fulbright organization in your home country and your home and host institutions. Funds for extensions of Fulbright stipends are not usually available and program length including extensions cannot exceed 12 months according to FFSB policy. Prior to submitting an extension request, consult your IIE/CIES contact person for funding availability and any specific rules that may apply to your country program. Please also refer to the Procedure for Extension or Transfer Requests below.

### Transfers

Transfer of your J-1 visa sponsorship from the Fulbright Program to another J-1 program is only possible if you have been offered an extraordinary opportunity for follow-up research or teaching that promotes the general goals of the Fulbright Program. Transfers must be fully funded by non-Fulbright sources and require approval by your home country Fulbright Office as well as the U.S. Department of State. Before applying for a transfer, please check in with your IIE Advisor and your home country's Fulbright Office to confirm any country-specific transfer policies you should be aware of.

If a transfer from the Fulbright Program is approved, ASPE health benefits will cease on the date of transfer and participation in Fulbright professional enrichment programs will no longer be available. In the event the transfer is made before you have used your return ticket that was purchased for your Fulbright grant, the transfer may result in the loss of your return travel benefit. It is your responsibility to make sure your international return ticket will still be valid on your new departure date associated with your transfer end date. Consult the Fulbright organization in your home country for more information. Please refer to the Procedure for Extension or Transfer Requests below.

## Part V: At the End of Your Grant Period

### Procedure for Extension or Transfer Requests

To apply for an extension or transfer, through the [self-service portal](#), submit the following documents to IIE/CIES **at least six weeks prior** to the end date of your current program:

- A letter from you formally requesting an extension or transfer and specifying the exact length of the extension or transfer, with start and end dates. You will need to explain specifically why the extension or transfer is being requested and how it would enhance your Fulbright project. This letter should not be longer than two pages.
- A letter from your faculty associate supporting your request and specifying the exact start and end dates of the extension or transfer period.
- Confirmation from your home institution that you have been given leave for the period requested.
- Confirm that passport for you (and any dependents) is valid 6 months past your new proposed end date.
- J-1 visa validity: If you obtain an extension and visa expires before your new grant end date, you will have to renew them if you travel abroad and return to the U.S. during your extension period.
- Confirmation of funding.
  - For U.S. Department of State-funded extensions:** If your grant was paid by IIE/ CIES and you intend to request an extension funded by the U.S. Department of State, please specify in your request letter that you are applying for funding based on your current stipend rate.
  - For unfunded extensions or transfers:** Please provide either a bank statement or a letter from a funding source specifying the amount of support. The U.S. Department of State may require a certain minimum, typically at least \$2,500 per month for the period requested, and in some cases more, depending on your circumstances or number of dependents you have with you. You can refer to your Fulbright Grant Document or contact your IIE/CIES contact to determine the exact amount needed.
- Complete the form Certification of Medical Insurance for Request Period of Extension or Transfer, which serves as written agreement to obtain accident and sickness insurance compliant with J-visa regulations for any accompanying dependents. For transfers, you will also need to obtain insurance for yourself.
- For transfers only**, supply a letter from the host institution stating its willingness to accept sponsorship of your J-1 program. The letter should indicate the date they recommend the transfer to take effect, the start and end dates of the transfer period, and their SEVIS program number.

If your request meets the requirements and your documentation is complete, IIE/CIES will submit your request to the U.S. Department of State for review. This review process can take up to four to six weeks. Beginning activities of your proposed extension or transfer is strictly prohibited until approval of the transfer request has been granted by the U.S. Department of State and the Fulbright organization in your home country. Please note that if you are from a tax-treaty country and you remain in the United States beyond two years, your tax-exempt status may be affected.

## Part V: At the End of Your Grant Period

### 32. Final Report and Certificate

You are required to complete the IIE/CIES final report online. Approximately two to six weeks prior to the end date of your grant, you will receive an email with log-in information to access your final report form. The final report includes several questions about your program that require you to select a response from a list of choices. You must complete the entire form, including the section at the end of the report in which you are asked to reflect on your Fulbright experience. You do not need to complete the final report all at once; you can save your information and log on again at any time to edit your final report. However, once you submit your final report, you can no longer make changes to it.

Your report will be used to evaluate and improve the Fulbright Program for future scholars. IIE/CIES will send a copy of the report to the U.S. Department of State and to the Fulbright organization in your home country. Your final report is also important because IIE/CIES may use information from the report in Fulbright newsletters, association journals, the IIE/CIES annual report and on the State Department's Fulbright Program and IIE/CIES websites. The details you provide in the narrative section will allow others to better understand how Fulbright Visiting Scholars help the Fulbright Program carry out its goals each year.

After successfully completing your program and submitting your final report, IIE will prompt you through the self-service portal to retrieve your digital certificate.

### 33. Immigration Regulations

#### Grace Period (post-program)

When you have completed your J Exchange Visitor Program, U.S. Citizenship and Immigration Services (USCIS) allows you and your dependents to remain legally in the United States for a maximum of 30 days past the end date that appears on your DS-2019 ([Section 7](#)). This 30-day period is commonly referred to as the grace period.

During this grace period, participants are no longer in J visa status. This period allows you to settle your affairs and prepare to return to your home country. You may not pursue grant activities, participate in the Outreach Lecturing Fund, or engage in employment activities.

Grant benefits, including ASPE benefits coverage and university privileges, do not remain in effect into your grace period. **Although you may travel in the United States during the grace period, if you travel beyond the borders of the United States, you will not be permitted to re-enter using your DS-2019.**

**If you stay in the United States beyond the 30-day grace period, you will be subject to serious consequences.**

The Illegal Immigration Reform and Immigrant Responsibility Act

## Part V: At the End of Your Grant Period

of 1996 lists penalties for visitors (including J-1 and J-2 visa holders) who stay in the United States longer than they are allowed. The visa in your passport will become invalid if you overstay the authorized period stated on your DS-2019 by even one day, regardless of the expiration date on your visa. Visitors who violate this provision must return to their home countries to apply for new visas every time they wish to re-enter the United States. In addition, visitors who overstay by 180 days to one year will not be allowed to return to the United States for three years.

Visitors who overstay by one year or more will not be allowed to return for 10 years.

### Visa Limitations on U.S. Re-entry

*The Two-Year Rule:* You and your dependents are subject to Code of Federal Regulations rule 212(e), the two-year, home-country residence requirement associated with the J-visa. As noted throughout this guide, the spirit of the Fulbright Program is to increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchange. When you have completed your grant, you are expected to return home to share the knowledge you have gained. This means that until you have resided and been physically present in your home country for a combined total of two years following your departure from the United States, you and your dependents are ineligible to apply for status in the United States as:

- Permanent residents,
- Temporary workers or trainees (visa status H),
- Fiancé(e)s (visa status K), or
- Intracompany transferees (visa status L).

Grounds for applying for a waiver of the two-year, home country residence requirement are extremely limited, and approval of waiver requests is rare. IIE/CIES cannot assist in this process. Waivers should not be requested as a means of continuing your grant activities. If you are interested in continuing your grant activities, see the section on extensions and transfers ([Section 29](#)).

*The Twenty-Four Month Bar:* If you have participated in a J-1 or J-2 visa exchange program in the Professor or Research Scholar category, you are not eligible for repeat participation as a Professor or Research Scholar for a period of 24 months. This bar is in place regardless of the length of time spent in the United States in this category and is NOT the same as the 212(e) two-year home residence requirement. The 24-month bar does not prohibit individuals from returning to the United States in any other J visa category or in any other non-immigrant status (F-1, B-2, etc.) during the 24-month period.

**The 24-month bar and the 212(e) two-year, home residence requirement can be completed concurrently if you remain in your home country during the 24-month period.**

## Part V: At the End of Your Grant Period

**If you have an opportunity for additional research or lecturing beginning immediately after your Fulbright grant and if you return to your home country before beginning these activities, you will have to wait 24 months to return to the United States again as a Research Scholar or Professor.** However, it may be possible for you to return as a J Short-Term Scholar for up to six months or with any other visa type for which you qualify. While rare, it may also be possible to transfer your sponsorship ([Section 29](#)) as a means of continuing these activities if they are a unique opportunity directly tied to your Fulbright project or research.

*The Twelve-Month Bar:* If you have participated in a J-1 or J-2 visa exchange program in any category of more than six months in duration and you wish to begin a second J-1 or J-2 exchange program in the category of Professor or Research Scholar, you must wait 12 months before starting your second program. This bar will be fulfilled concurrently with the 24-month bar.

The exceptions to this twelve-month bar are:

- Prior presence in J status on an exchange program of less than six months duration,
- Prior presence in J status on an exchange program as a Short-Term Scholar, or
- Transfer to a new program sponsor within the maximum duration of participation; five years for the Professor or Research Scholar category.

### 34. Health Benefits After the Grant Period

The ASPE health benefits plan expires at the end of your grant period. If you decide to remain in the U.S. during the 30-day grace period, you will not be covered by ASPE health benefits. If you receive approval to remain in the United States after your Fulbright Program under a transfer of sponsorship, you will not be covered by ASPE health benefits. It is your responsibility to ensure that you and your dependents obtain medical benefits coverage that is compliant with J Exchange Visitor Program regulations from a company of your choice. You may also elect to purchase coverage during the grace period following your grant end date ([see Appendix C Sources of Dependent, Supplemental and Short-Term Insurance](#)).

### 35. Continuing Fulbright Opportunities

There are several ways in which you can stay involved with the Fulbright Program when you return to your home country. As a Fulbright Alumnus/Alumna, you are an important resource for other academics and professionals who may want to learn about your experiences in research and/or lecturing abroad.

Many of your colleagues in your home country may not be aware of the kinds of opportunities that the Fulbright Scholar Program offers. They may enjoy learning directly from you about the benefits and challenges of your experience in the United States.

Also, you may be able to encourage your U.S. colleagues to apply to become U.S. Fulbright Scholars to your country or to other participating countries.

Please encourage your U.S. host institution to host other Visiting Scholars in their community for short-term visits through the Outreach Lecturing Fund ([section 23](#))

In addition, you may find an organized Fulbright Alumni association in your country that can provide further opportunities to share your experiences. A list of Fulbright Alumni organizations around the world can be obtained from the U.S. Fulbright Association website at [www.fulbright.org](http://www.fulbright.org).

In some countries, Fulbright Alumni are included in larger alumni associations of individuals who have studied in or received grants to the United States. To find out about these alumni activities, contact the Fulbright organization in your country to see how you can be involved in joining or forming an alumni association.

You may also find the Fulbright Program's official social media sites useful for maintaining contact with Fulbright friends and colleagues in the United States and connecting with alumni around the world ([Section 24](#)). These sites also provide updates about the Fulbright Program and feature notable accomplishments of grantees and alumni.

To continue the professional relationships you have cultivated during your grant, please consider hosting your faculty associate or another U.S. colleague through the Fulbright U.S. Scholar Program. You are encouraged to refer them to IIE/CIES's recruitment department through the U.S. Scholar [referral initiative](#).



# Appendix A: Sample Form DS- 2019



U.S. Department of State  
**CERTIFICATE OF ELIGIBILITY FOR EXCHANGE VISITOR STATUS (J-NONIMMIGRANT)**

OMB APPROVAL NUMBER: 3045-0048  
EXPIRES: 07-31-2014  
ESTIMATED BURDEN TIME: 47 min  
Form Page 1

1. Exchange Visitor Name: <b>Example</b>		Class/Status: <b>John</b>		Gender: <b>MALE</b>		NO000147766	
Type of Exchange Visitor: <b>12-09-1990</b>		City of Birth: <b>Anytown</b>		Country of Birth: <b>IRELAND</b>		Citizenship Country Code: <b>IE</b>	
Legal Permanent Resident Country Code: <b>IE</b>		Legal Permanent Resident Country: <b>IRELAND</b>		Position Code: <b>215</b>		Position: <b>UNIVERSITY UNDERGRADUATE STUDENTS</b>	
Primary Site of Activity: <b>Exempt from Pre-placement</b>							
3. Program Sponsor: <b>Acme Training</b>				Program Number: <b>D-4-16311</b>			
Participating Program Official Designation: <b>TRAINING</b>							
Purpose of this form: <b>Begin new program, accompanied by member (1) of immediate family members.</b>							
3. From Commencement Period: From (see 4b)(year): <b>04-02-2015</b> To (see 4b)(year): <b>05-15-2016</b>		4. Exchange Visitor Category: <b>TRAINING</b>					
		Subject/Field Code: <b>04.0902</b>		Subject/Field Code Extension: <b>None</b>			
5. During the period covered by this form, the total estimated financial support (in U.S. \$) to be provided to the exchange visitor by: Current Program Sponsor: <b>None + \$0,000.00</b> Parent(s): <b>None + \$0,000.00</b> Total: <b>None + \$0,000.00</b>							
6. DEPARTMENT OF STATE CONSOLE OFFICER OR ALTERNATE RESPONSIBLE OFFICER OF THIS OFFICE 10TH U.S. CONSULATE GENERAL 1000 MOTOR VEHICLE BLVD. DETROIT, MI 48201		TYPED NAME: <b>Mary Hafer</b> SIGNATURE: TITLE: <b>Alternate Responsible Officer</b>		DATE: <b>05-06-2015</b>		DATE (see 4b)(year):	
8. Statement of Responsible Officer for Exchange Visitor (FOR TRANSFER OF PROGRAM) Effective date (see 4b)(year): _____ Transfer of this exchange visitor from program number _____ sponsored by _____ to the program specified in item 1 is necessary or highly desirable and is in conformity with the objectives of the Mutual Educational and Cultural Exchange Act of 1952, as amended.							
Signature of Responsible Officer or Alternate Responsible Officer				Date (see 4b)(year) of Signature			
PRELIMINARY ENDORSEMENT OF CONSUL OR IMMIGRATION OFFICER REGARDING SECTION 101(a) OF THE IMMIGRATION AND NATIONALITY ACT AND PL 96-486, AS AMENDED (See item 10d of page 2) The Exchange Visitor to the above program: 1. <input type="checkbox"/> Not subject to the two-year residence requirement. 2. <input type="checkbox"/> Subject to the two-year residence requirement based on: A. <input type="checkbox"/> One-year training and/or B. <input type="checkbox"/> The Exchange Visitor Skills List and/or C. <input type="checkbox"/> PL 96-486 as amended. <small>(ALL EXCHANGE VISITORS MUST READ AND ALL APPLICANTS SPONSORED BY PROGRAMS ARE SUBJECT TO THE TWO-YEAR HOME RESIDENCE REQUIREMENT)</small>				TRAVEL VALIDATION BY RESPONSIBLE OFFICER (Maximum validation period is 1 year) *EXCEPT: Maximum validation period is up to 6 months for Exchange Visitors and 3 months for Camp Counselors and Summer Work Travel. (1) Exchange Visitor is in good standing at the present time. _____ Date (see 4b)(year) _____ Signature of Responsible Officer or Alternate Responsible Officer (2) Exchange Visitor is in good standing at the present time. _____ Date (see 4b)(year) _____ Signature of Responsible Officer or Alternate Responsible Officer			
Name: _____ Title: _____ Signature of Consular or Investigation Officer: _____ Date (see 4b)(year): _____				Name: _____ Title: _____ Signature of Responsible Officer or Alternate Responsible Officer: _____ Date (see 4b)(year): _____			
THE U.S. DEPARTMENT OF STATE RESERVES THE RIGHT TO MAKE FINAL DETERMINATION REGARDING THIS							
EXCHANGE VISITOR CERTIFICATION: I have read and agree with the statement in item 7 on page 2 of this document.							
Signature of Applicant		Name		Date (see 4b)(year)			

## Appendix B: Summary of U.S. Custom Regulations

The U.S. Customs and Border Protection (CBP) declaration form (Form 6059B) will be distributed to you upon your arrival by the flight attendant or immigration official. Complete the declaration form prior to your arrival to expedite your CBP clearance. When completing the written declaration, you must list all foreign goods accompanying you, other than your personal effects (such as clothing, toiletries, jewelry, cameras, etc.). The purchase price of foreign articles that you declare must be stated in U.S. dollars. If you are arriving in the United States by land transportation, then you will make an oral declaration of all foreign articles.

Please see the following list of exemptions to further clarify what you are required to declare:

- *Personal effects:* You may bring any personal effects (clothing, toiletries, jewelry, sporting goods, cameras, radios, etc.), if they are for personal use, belong to you, and will accompany you both into and out of the United States.
- *Bringing your personal computer to the United States:* If you bring your personal computer with you, you should include it on your declaration form (Form 6059B) upon arrival in the United States as part of your personal effects.
- *Currency:* There are no restrictions on the import of U.S. or foreign currency, but you must file a report with U.S. Customs and Border Protection if you wish to bring more than U.S. \$10,000 into the United States.
- *Fruits, Vegetables, Plants, Meats, Livestock and Poultry:* Many fruits, vegetables, plants, cuttings, seeds, unprocessed plant products and certain endangered plant species are either prohibited from entering the United States or require an import permit. Every single plant, plant product, fruit or vegetable must be declared to the CBP officer or CBP Agriculture Specialist for pest inspection. Also, meats, livestock, poultry and their by-products are either prohibited or restricted entry into the United States depending on their country of origin. Most  
• commercially canned or processed items are admissible. Applications for import permits or requests for information can be made by contacting the U.S. Department of Agriculture's (USDA) Animal and Plant Health Inspection Service (APHIS) at [www.aphis.usda.gov](http://www.aphis.usda.gov).
- *Alcohol and tobacco:* Each traveler over 21 years of age may import up to one liter of alcoholic beverage and either 200 cigarettes, 50 cigars or two kilograms of smoking tobacco for personal use. Cigars may not be of Cuban origin.
- *Gifts:* You may bring in gift items up to a total value of \$100. Gifts may not include alcoholic beverages, perfumes containing alcohol with a retail value of more than \$5 or cigarettes. However, an additional 100 cigars (not of Cuban origin) may be brought in addition to the allotted amount under the alcohol and tobacco exemption.
- *Computers purchased in the United States:* If you purchased a computer for more than \$2,500, you will need to complete a Shippers' Export Declaration form before leaving the United States. You can obtain this form from your airline.
- This information is excerpted from the U.S. Customs and Border Protection's website. For the most up-to-date customs information, please refer to [www.cbp.gov](http://www.cbp.gov).

## Appendix C: Sources of Dependent, Supplemental and Short-Term Insurance

You must purchase insurance for all accompanying J-2 dependents, as family members of Fulbright Scholars do not receive medical coverage from the U.S. Department of State. You may also wish to purchase supplemental insurance for yourself and are strongly encouraged to do so especially if you have pre-existing conditions that require ongoing treatment.

Below is a list of some companies in the United States with health insurance plans that are available to you and your dependents. Some plans offer enrollment and payment via the Internet. It is a good idea to compare thoroughly benefits and prices of at least two plans.

Please note that this list is for informational purposes only, it does not represent any endorsement by the Fulbright Program. To determine if plans are available to meet your needs, contact the insurance provider or check their websites.

### **Associated Insurance Plans International, Inc.**

609 North Pine Street, Suite 202  
Burlington, WI 53105  
Tel: 800-452-5772  
Fax: 262-758-6344  
E-mail: [office@aipstudentinsurance.com](mailto:office@aipstudentinsurance.com)  
Website: [www.aipinternational.com](http://www.aipinternational.com)

### **Cultural Insurance Services International**

River Plaza  
1 High Ridge Park  
Stamford, CT 06905-4320  
Tel: (800) 303-8120  
Fax: (203) 399-5596  
E-mail: [cisiwebadmin@culturalinsurance.com](mailto:cisiwebadmin@culturalinsurance.com)  
Website: [www.culturalinsurance.com](http://www.culturalinsurance.com)

- \$100,000 of medical benefits per injury/illness
- Emergency evacuations and repatriation covered to \$50,000
- \$200 deductible, \$300 deductible for non-emergency emergency room visits

Excludes pre-existing conditions

## **Global Underwriters**

3195 Linwood Road  
Suite 201

Cincinnati, OH 45208-2902

Tel: (800) 423-8496 (Inside US) or (513) 533-1500 (Outside US) Fax: (513) 533-1504

E-mail: [peter@globalunderwriters.com](mailto:peter@globalunderwriters.com)

website: [www.globalunderwriters.com](http://www.globalunderwriters.com)

## **Diplomat Long term**

- Major medical coverage from \$50,000 to \$1,000,000, depending on age
- Repatriation of remains up to \$50,000
- Medical evacuation to home country up to \$500,000
- Deductibles as low as \$50
- Excludes pre-existing conditions

## **Diplomat America**

- Major medical coverage from \$50,000 to \$1,000,000, depending on age
- Repatriation of remains up to \$50,000
- Medical evacuation up to \$500,000
- Deductibles as low as \$50
- Excludes pre-existing conditions

## **The Harbour Group**

93 Edgebrook Drive P.O. Box 998

Springboro, OH 45066-9168

Tel: (937) 748-5200

Fax: (877) 702-2556

E-mail: [info@hginsurance.com](mailto:info@hginsurance.com)

Website: [www.hginsurance.com](http://www.hginsurance.com)

## **International Student and Scholar Medical Insurance**

- \$500,000 to \$600,000 of coverage for scholars (for dependent insurance, please contact the company directly)
- Medical evacuation: Actual cost of evacuation
- Repatriation of remains: Actual cost of repatriation of remains
- Deductible as low as \$200 per policy period
- Online enrollment available

- Does not exclude pregnancy for scholars if it occurs after enrollment
- Excludes pre-existing conditions

### **HTH Worldwide**

100 Matsonford Road  
One Radnor Corporate Center  
Suite 100  
Radnor, PA 19087-4566  
Tel: (610) 254-8700 or (888) 243-2358  
Fax: (610) 254-8797  
E-mail: [customerservice@hthworldwide.com](mailto:customerservice@hthworldwide.com)  
Website: [www.hthworldwide.com](http://www.hthworldwide.com)

### **Global Student USA Preferred**

- \$250,000 of coverage per incident (up to \$1,000,000 lifetime policy maximum)
- Medical evacuation \$100,000
- Repatriation coverage \$25,000
- Deductible as low as \$50
- Covers pregnancy
- Online enrollment available
- Dependent coverage not available
- Excludes pre-existing conditions

### **Patriot Exchange Program**

- Coverage for 10 days to 2 years
- Up to \$5,000,000 coverage per incident
- Medical evacuation up to policy maximum
- Repatriation \$25,000
- \$100 deductible per illness or injury
- \$25,000 accidental death coverage
- Injury and accident coverage
- Worldwide coverage, including up to 2 weeks in home country
- Online quote and enrollment available
- Excludes pre-existing conditions

## **International Student Organization in America (ISOA)**

150 West 30th Street Suite 1101  
New York, NY 10001-1901  
Tel: (800) 244-1180  
Fax: (212) 262-8920  
E-mail: [mailbox@isoa.org](mailto:mailbox@isoa.org) or [customercare@isoa.org](mailto:customercare@isoa.org)  
Website: [www.isoa.org](http://www.isoa.org)

## **PSA Financial Center**

UnitedHealthcare Global  
8501 LaSalle Road  
Suite 200  
Baltimore, MD 21286  
Tel: (800) 732-5309  
E-mail: [safetrip\\_info@unhcglobal.com](mailto:safetrip_info@unhcglobal.com)  
Website: <https://uhcsafetrip.com/>

## **Seven Corners, Inc.**

303 Congressional Boulevard  
Carmel, IN 46032-5631  
Tel: (800) 335-0611 (General Questions) or (800) 690-6295 (Benefit Questions)  
Fax: (317) 575-2659  
E-mail: [sales@sevencorners.com](mailto:sales@sevencorners.com)  
Website: [www.sevencorners.com](http://www.sevencorners.com)

## **Travel Insurance Services**

1 International Plaza, Suite 400  
Philadelphia, PA 19113  
Tel: (800) 937-1387  
Fax: (484) 652-5394  
E-mail: [info@travelinsure.com](mailto:info@travelinsure.com)  
Website: [www.travelinsure.com](http://www.travelinsure.com)

## **Wallach & Company, Inc.**

107 West Federal Street  
P.O. Box 480  
Middleburg, VA 20118-0480  
Tel: (800) 237-6615 or (540) 687-3166  
E-mail: [info@wallach.com](mailto:info@wallach.com)  
Website: [www.wallach.com](http://www.wallach.com)