



Dean John A. Knauss Marine Policy Fellowships

Frequently Asked Questions

Who are my California Sea Grant contacts?

General Fellowship questions:

James Eckman, Director (858) 534-4440, jeckman@ucsd.edu

Stipend payment, health insurance and travel reimbursement questions:

Carol Bailey-Sumber, Grants Specialist, (858) 534-7855, cbsumber@ucsd.edu

General office fax: (858) 534-2231

Mailing Address:

California Sea Grant
University of California San Diego
9500 Gilman Drive, Dept. 0232
La Jolla, CA 92093-0232

Express Mailing Address:

California Sea Grant
University of California San Diego
8670 Kennel Way (Old Director's House)
La Jolla, CA 92037-0232

Are there differences in how each Sea Grant handles reimbursements?

Yes. Each state Sea Grant office abides by policies instituted by their hosting university. California Sea Grant must abide by the University of California Office of the President and University of California San Diego policies and procedures. One of our goals is to reimburse fellows as much as possible, according to UCOP and UCSD guidelines. Some of these policies and procedures may change per fiscal year.

Am I considered a UCSD employee?

No. You are not considered a UCSD employee. You are paid via Pay Authorizations (non-payroll) through UCSD Disbursements.

What are the allocation amounts for my fellowship?

Before your fellowship begins, \$56,500 will be awarded to CA Sea Grant for disbursement, during the effective dates of the fellowship (February 1 – January 31). As stated by the National Sea Grant Office:

The Sea Grant Program receives and administers the overall cooperative agreement of \$56,500 for each fellow selected from their program. Of this amount, the eligible Sea Grant Program provides \$45,000 to each Fellow for stipend and living expenses (per diem). Of the total cooperative agreement amount, the Sea Grant Program provides \$9,000 to cover mandatory health insurance for the fellow and moving expenses. Any remaining funds of the \$9,000 shall be used by the fellow during the fellowship year, first to satisfy academic degree-related activities, and second for fellowship-related activities. Finally, up to \$2,500 from the total \$56,500 can be used to cover placement week costs. Indirect costs are not allowable from the federal funds either for the fellowships or for any costs associated with the fellowships, including the \$2,500 budgeted for placement week (see 15 CFR 917.11(e), "Guidelines for Sea Grant Fellowships"). During the fellowship, the host may provide supplemental funds for work-related travel by the fellow.

Please note that California Sea Grant or UCSD does not provide health insurance. However, CA Sea Grant will reimburse costs for private insurance that you may already have or will obtain. Currently, your proposal has \$9,000 budgeted for health

insurance, moving and travel. You must have health insurance while on travel status. The amount set aside for health insurance reimbursement can be increased upon your request, decreasing the amount for moving expenses and travel accordingly.

When will I receive my first stipend check?

Your stipend will be issued via UCSD Disbursements. Timely payment of your first stipend payment is dependent upon the timely receipt of your fellowship funds from the National Oceanic Atmospheric Administration (NOAA). Please provide our office with your most current mailing address, phone number and email. If you have set up direct deposit, the money will be deposited into your account.

How do I apply for direct deposit?

Access the California Sea Grant website for a direct deposit form. It may take 2-4 weeks for the direct deposit to take affect. The form may be downloaded from our website at http://www-csgc.ucsd.edu/EDUCATION/KNAUSS/Knauss_current.html. Look under the Information for Current Knauss Fellows.

Send the completed form and a voided check or account deposit slip to the Sea Grant office.

What are the procedures for requesting *domestic* travel authorization and reimbursement?

Travel requests (degree or fellowship/work-related) must be approved in advance by your host and California Sea Grant. Please send an email to your host supervisor requesting permission to travel and include an estimate of expenses. Once the host replies to you and approves your travel, please forward that e-mail to Jim (jeckman@ucsd.edu) and copy this email address (sgfiscal@ucsd.edu) and Carol (cbsumber@ucsd.edu). Jim will then review the travel request for appropriate use of fellowship funds.

Domestic travel includes travel to all U.S. possessions or trusts, such as Puerto Rico, the Virgin Islands, the Trust Territories, Guam, and Samoa.

At the conclusion of your trip, fill out a Travel Reimbursement Form, which can be found at: http://www.csgc.ucsd.edu/EDUCATION/KNAUSS/Knauss_current.html and submit it along with all expense receipts to:

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Effective January 2015, reimbursements for travel expenses need to be submitted within 45 days of the trip's completion (including days to prepare the claim, obtain certifications and approvals, provide any required information or documents, and reviewed and approved by Sea Grant and routed to UCSD for final review and approval). **Reporting of expenses submitted after 45 days may be treated as taxable, or may not be paid.**

What are the procedures for requesting *foreign* travel authorization and reimbursement?

Please see below for a list of the required documentation for a foreign travel request. Upon approval, proceed with processing your request. Please remember that this process must be completed 50 days in advance of the expected date of travel to ensure adequate opportunity for your host's, the National Sea Grant program and our program's comments and approval.

Reimbursement for travel expenses shall not be higher than the University of California approved travel rates. These travel rates are published at <http://www.ucop.edu/ucophome/policies/bfb/q28.html>.

CASG requires a written request with justification at least fifty (50) days PRIOR to the trip in order to notify the National Sea Grant office. Your trip should be approved by your host prior to submitting the request to California Sea Grant. Once the host approves your travel, please e-mail the request with subject line "Knauss travel request" to Jim (jeckman@ucsd.edu) and copy (sgfiscal@ucsd.edu) and Carol (cbsumber@ucsd.edu) in the email.

Travel Checklist: All foreign travel must be in compliance with the Fly America Act (see link below). A U.S. flag air carrier must be used on all portions of the route where service is provided.

Requests for prior approval should be written in the third person and include the following:

- a) Traveler's name;
- b) Dates traveled;
- c) Reason for the trip;
- d) Origin and destination of the travel;
- e) Detailed itinerary of the travel, name of the air carrier, and flight number for each leg of the trip (a PDF of a quote from an airline with details of the proposed trip and cost should accompany the letter); and
- f) Detailed cost for lodging, meals, registration (i.g. Lodging 3 days @ \$/day = \$; Meals 3 days @ \$ govt per diem rate or less)

At the conclusion of your trip, fill out a Travel Reimbursement Form, which can be found at: http://www.csgc.ucsd.edu/EDUCATION/KNAUSS/Knauss_current.html and submit it along with all expense receipts to:

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What is the procedure for requesting health insurance reimbursement?

Please provide proof of insurance (via email or postal mail) and for each monthly reimbursement, proof of payment will be required. Acceptable documents showing proof of payment are copies of cancelled checks (along with the corresponding payment coupon/invoice), bank statements, or credit card statements. Please contact Carol Bailey-Sumber if you require additional information.

Is my fellowship considered taxable income?

Fellowships are defined as payments to aid one's pursuit of advanced training and research and are issued for the primary benefit of the individual receiving the payment. Because of their status as non-degree candidates, **fellowship income received by a Postdoctoral Scholar is generally considered fully taxable by the federal and state tax boards**. Please contact your tax advisor or the IRS for current regulations.

Where to Obtain Forms, Instructions And Publications

Federal (IRS): <http://www.irs.gov>

Federal Tax Withholding Calculator at irs.gov (enter "calculator" in Search IRS Site)

CA State: <http://www.ftb.ca.gov>

Some IRS Publications that may assist you in filing your return are:

Publication 17 **Your Federal Income Tax**

Publication 505 **Tax Withholding & Estimated Tax**

Publication 970 **Tax Benefits for Education.**

This is not a comprehensive list. Please consult your tax advisor for more information.