Who are my California Sea Grant contacts?

GENERAL FELLOWSHIP QUESTIONS
Miho Ligare, Research and Fellowship Coordinator
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STIPENDS, HEALTH INSURANCE AND TRAVEL REIMBURSEMENT QUESTIONS
Herminia Villalpando, Fund Manager hvillalpando@ucsd.edu 858-534-4442

TRAVEL PRE-AUTHORIZATION
James Eckman, CA Sea Grant Director jeckman@ucsd.edu

MAIN PHONE
(858) 534-4440

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 (via UPS, FedEx)
California Sea Grant
University of California, San Diego
8830 Biological Grade Way
La Jolla, CA 92037
What are the allocation amounts for my fellowship?

The CA Sea Grant program administers the overall award of $50,900 (based on a 12-month period) per fellow. Of this amount, the CA Sea Grant program provides $45,500 ($3,791.66 per month) to each fellow for stipend and living expenses. CA Sea Grant will reimburse costs for private health insurance that you may already have or will obtain, up to a total of $3,000 over twelve months. There is also $2,400 available to cover expenses for the matching workshop, joint CA Sea Grant Extension Program meeting, and any remaining funds can be applied to other fellowship-related travel.

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 direct deposit form. You will be paid one month in arrears and since this is not through the payroll system and must go through multiple approval processes, there is not a specified date that you will receive your stipend. Please provide our office with your most current mailing address, phone number and email.

Am I considered a UCSD employee?

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

How do I apply for direct deposit?

Submit a completed direct deposit form to Herminia at hvillalpando@ucsd.edu

The direct deposit form may be downloaded from our website at: go.ucsd.edu/2bGvCVV

How long does it take for my direct deposit to be processed?

The turnaround time for an initial direct deposit enrollment is seven to ten days, which includes time for both UCSD and the bank to process your request.
Does CA Sea Grant/UCSD provide health insurance?

No. However, CA Sea Grant will reimburse cost for private insurance that you may already have or will obtain up to a total of $3,000 over twelve months.

*NOTE:* For reimbursement to be allowable, the health insurance policy must name the fellow as the insured party, AND the fellow must be identified as making the payment. Sea Grant cannot reimburse payments made by a spouse, domestic partner or parent, even if the fellow is named on the policy.

What is the procedure for requesting health insurance reimbursement?

Every month, e-mail your reimbursement request to Herminia Villalpando (hvillalpando@ucsd.edu; subject line “Health Insurance reimbursement – Month”) with a pdf attachment of your proof of health insurance payment.

What is considered acceptable proof of payment?

Acceptable documents showing proof of payment are copies of cancelled checks (along with the corresponding payment coupon/invoice), bank statements, or credit card statements. As noted above, the insurance policy must name the fellow AND payment receipt must be in the name of the fellow.

Can I use my allotted $3,000 to cover co-payments and other medical expenses?

No, your allotted amount is for reimbursement of your health insurance premium only.

**COVERED UNDER YOUR PARENTS?**

If you are under 26 and on your parent’s health insurance plan, you may choose to stay on your parent’s plan until you are 26. However, Sea Grant will not reimburse you for health insurance. If you are turning 26 during your fellowship year, plan in advance to start a new insurance plan.
THE BASICS

Do I need to request travel pre-approval when I travel?
Yes. Travel requests must be approved in advance by your host and California Sea Grant.

What is the procedure for requesting domestic travel pre-authorization?
Send an email to your host supervisor requesting permission to travel and include a completed pre-approval form. Once the host approves your travel, please forward that email with the form attached to Jim (jeckman@ucsd.edu) and copy to sgfiscal@ucsd.edu and Herminia (hvillalpando@ucsd.edu). Jim will then review and respond to the travel request for appropriate use of fellowship funds.

Where can I find the pre-approval form?
The pre-approval form may be downloaded on our website at: go.ucsd.edu/2bGvCVV

What happens if I travel without pre-approval?
You run the risk of not being reimbursed for partial or all of your travel expenses.

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

REIMBURSEMENT

I just came back from my travel. Now what?
At the conclusion of your trip, fill out a Travel Reimbursement Form, which can be found at: go.ucsd.edu/2bGvCVV. Submit this form with all expense receipts to Herminia (hvillalpando@ucsd.edu) and sgfiscal@ucsd.edu

Can I hold on to my travel receipts until the end of my fellowship so I can receive one lump sum?
No. Effective January 2015, reimbursements for travel expenses need to be submitted within 30 days of the trip’s completion. Reporting of expenses submitted after 44 days may be treated as taxable, or may not be paid.

NOTE: For travel shorter than 24 hours, meals can only be claimed if you had:
• An overnight stay and you provided a lodging receipt
• A working meal was scheduled as an integral part of a meeting or conference (include the agenda for the meeting that itemizes the meal)
IN GREATER DETAIL...

All travel must utilize the most economical mode of transportation and commonly traveled route. If you have any questions, please contact Herminia (hvillalpando@ucsd.edu).

**AIRFARE**
- Please provide an e-ticket, original passenger receipt, or travel agent receipt that shows traveler’s name, airfare costs, class of travel (i.e. economy, business, etc.), form of payment, dates, and route.
- Sea Grant will only reimburse the cost of coach airfare.
- Early check-in fees and upgrades are non-reimbursable.
- Please note that all travel must be in compliance with the Fly America Act, which mandates the use of US carriers on all legs of the trip, including code shared flights. PRIOR approval by Jim is required if a foreign carrier is to be used on ANY portion of a trip. Contact Herminia if you have any questions.

**LODGING**
- Please provide an itemized copy of the original receipt summarizing cost of daily lodging and other expenses.
- Sea Grant will only reimburse the room rate plus associated taxes. Any other in-room charges such as internet or room service will **not be reimbursed**.
- If you share a room with another fellow, each person will need to submit an itemized folio that provides individual proof of payment.
- Avoid “package deals” as they’re generally ineligible for reimbursement. Expenses combined in a package usually fail to meet receipt requirements.
- You must be at least 40 miles from home/headquarters (whichever is closer) to be reimbursed for an overnight stay.

**MEALS**
- Please keep all itemized meal receipts during your trip so you can submit a copy at the conclusion of your trip.
- You may claim only the actual amount spent and that amount may not exceed $74/day for travel lasting 1-29 days.
  - If the full amount ($74) is claimed, you will need to provide additional information of why this is so, otherwise the reimbursement request will be rejected (i.e. receipts, meal log and/or clear justification of expense). If you routinely claim the maximum amount under all travel conditions, it will appear that the maximum meal expenses are being used incorrectly. In this case, the UCSD Travel Office will notify you that your expenses will be reported as taxable income.
- Meals are not reimbursable for any trip lasting under 24 hours unless you have an overnight stay and provide a lodging receipt.
- **Alcohol will not be reimbursed.**
TRAavel (CONTINUED)

PRIVATE VEHICLE

- Please provide original receipts for tolls and parking costs. You cannot request reimbursement for gas since you will be reimbursed based on mileage.

- Beginning Jan. 1, 2017, the IRS standard mileage rates for the business use of a car (also vans, pickups or panel trucks) is 53.5 cents per mile (mileage rate includes the cost of fuel).

- If you are carpooling, only the driver can claim mileage reimbursement.

- Flying vs. Driving – When choosing surface transportation in lieu of air travel, the total cost of surface transportation cannot exceed the equivalent lowest cost airfare. Proof of airfare cost, such as a screen capture of flights prices during the same time, must be provided.

- You must seek pre-approval of mileage from Jim if your mileage exceeds 250 miles round-trip.

RENTAL CARS

- You will need to provide an itemized copy of the rental car and gas receipts with proof of payment to request reimbursement.

- Rental car reimbursement is for up to an economy/standard model unless a no-cost upgrade is provided.
  - An expense for upgrading, including for a built-in GPS, is generally not eligible for reimbursement.

- To minimize expenses, return the rental car with specified amount of gas in the tank so that refueling by the agency is not required.

- If you are carpooling with other fellows, you can split the total cost. Please make it clear as to how much each person paid when you submit for reimbursement.

CONFERENCE & REGISTRATION FEES

- Please provide a copy of the original receipts indicating traveler’s name, cost, date, type of payment, and event title.

- Conference/Registration fees are reimbursed with your travel expenses after your trip has concluded.

SPLITTING EXPENSES WITH ANOTHER FELLOW

- Lodging – Each person must submit an itemized receipt with proof of their payment.

- Meals - Each person must submit an itemized receipt with proof of their payment.

- Private Vehicle – Only the person driving may request reimbursement for mileage.

- Rental Cars - Each person must submit an itemized receipt with proof of payment.

- Conference / Registration Fees – These expenses cannot be split. You must have your own individual receipt.

Please note: You cannot pay the full amount of any travel expenses and request reimbursement from another Fellows travel funds. If you pay for the expense, once approved, the expense will be reimbursed to you using your allocated travel funds. No Exceptions.
Is my fellowship considered taxable income?

Fellows are considered 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 is considered fully taxable by the federal and state tax boards. Please contact your tax advisor or the IRS for current regulations.

Will I receive a 1099 or a W-2 at the end of my fellowship?

No. Taxes are not taken out of your fellowship award because you are not a UCSD employee. In addition, a fellowship is not a 1099 (independent contractor/consultant).

Where to obtain forms, instructions and publications

Please see these IRS guidelines for more info:

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