

BRAZIL SCIENTIFIC MOBILITY PROGRAM

Financial Policies

May 2013

Financial Policies for Brazil Scientific Mobility Program

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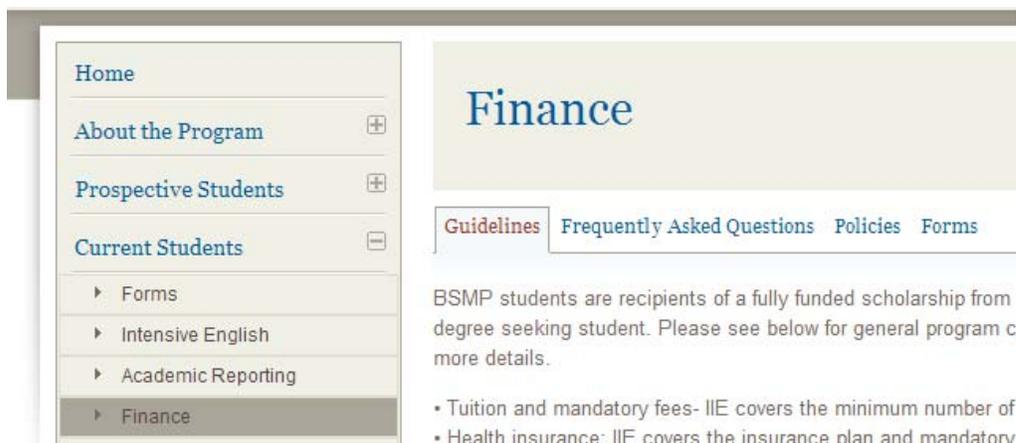
Financial Policies for Brazil Scientific Mobility Program

A) General Billing

- 1) All billing statements and invoices (for tuition, fees, housing, meal plans, insurance, etc.) should be sent to IIE at bswbpayment@iie.org or to the address below, so that we can make payments on your behalf upon receipt of the invoice.

*Institute of International Education
ATTN: Finance-2nd Fl.
Brazil Scientific Mobility Program
809 United Nations Plaza
New York, NY 10017-3580*

- 2) Upon your arrival on campus, make sure that you contact the Bursar or Accounting Office and request that all billing statements and invoices be sent to IIE. Inform your University that your scholarship is “foreign-sourced”.
- 3) You **MUST** update your address to your **U.S. University residence hall address or your off-campus address** once you arrive at your University. Failure to do so will result in delayed receipt of important documents, such as health insurance and banking cards.
- 4) You will most likely receive billing statements from your University via email or mail. Before sending any invoices to IIE, please contact the University first and make sure they will invoice IIE directly. **If they will not invoice IIE directly, you are ONLY then permitted to forward IIE the invoice**, as long as it includes a written statement/email from the University saying that they will not invoice IIE.
- 5) All Universities/entities that bill IIE need to provide IIE with a W9 form. **Without the W9 form, IIE cannot issue any payments to the University or housing provider.**
- 6) If you have any questions, concerns, or require forms from IIE, please email bswbpayment@iie.org and specify your request by following the email guidelines (see screen shot below).



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- 7) Please note: **All requests will take 10-15 business days to process.** This includes, but is not limited to, payments of invoices, payments of application fees and housing deposits, electronic funds transfers, reimbursements, financial guarantees, health insurance coverage, etc.

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B) Travel

- 1) **Luggage**: IIE will **NOT** cover the extra cost of luggage (overweight bags, extra bags, etc.) so make sure to pack the standard number of bags and under the maximum allowable weight. Please check with your airline to determine the standard number of bags.
- 2) **Transportation from the Airport to Campus**: IIE will **NOT** cover the cost of your transportation to the University from the airport. You must use your “settling-in” stipend of \$1,300 to cover the cost. Make sure your University does not invoice IIE for this fee.
- 3) **Transportation on Campus**: Your University should offer a transportation service, usually by bus, from your residence hall to your academic buildings where classes are held.
 - a. IIE will not pay for transportation costs to or from classes. (Ex. Subway or bus pass)
 - b. IIE will not pay for transportation costs outside your University campus.

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C) Tuition

- 1) **Maximum/Minimum Number of Credits:** You must take enough credits to ensure that you are a **full-time student**. For many universities, this means 12 to 15 credits. You are only approved to enroll in more than 15 credits if the following conditions are met:
 - a. There are no additional tuition costs (for example, 15 credits costs \$10,000.00 and 17 credits cost \$10,000.00 as well)
 - b. You have prior approval from nsavot@iie.org (please save the approval email)
- 2) **Additional Course Fees:** IIE will only pay for additional course fees if the course is related to your major/field of study. If you are taking a course that requires additional course fees and is **not related** to your major/field of study, IIE will not pay for these fees. You are responsible for the cost of these fees, or you must choose another course to take. IIE will **not** pay for course fees such as supplies and books.
- 3) **Dropped Courses:** Please choose classes carefully and speak to your advisor prior to enrolling in classes. You are only allowed to drop courses during the add/drop period and if there are no additional costs associated with dropping a course. Please consult with your University advisor for more details about this process. In order to drop a class, you must provide IIE with proof that your academic advisor gave you approval to take the class.
 - a. If you drop a course and there are additional costs as a result, you must follow the directions below in order for IIE to cover the costs. If you do not follow these directions, you will be **fully responsible** for these costs.
 - i. You must obtain email proof from your University advisor that you were approved by your advisor to take this course.
 - ii. You must email nsavot@iie.org to receive approval from IIE before dropping the course.
 - iii. You must forward the University advisor's email AND the approval from IIE as two attachments in your email to bswbpayment@iie.org for processing.
- 4) **Transcript Fees:** IIE will not pay for transcript fees. You are responsible for the costs of transcripts.

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D) Application Fees/Deposits

- 1) Application fees and housing deposits are **small, one-time fees** that must be paid prior to registration for courses or moving in to your housing location. These fees are **NOT** to be confused with charges for tuition, course fees, meal plans, rent, insurance, etc.
- 2) Application fees and housing deposits are not required by every University or housing entity to be paid upfront and will usually be invoiced to IIE. Please find out if your University or housing entity will invoice IIE for the application fee or deposit **before** contacting IIE for payment.
- 3) If the application fee or housing deposit cannot be invoiced, IIE can pay via **VISA** credit card. **This is the ONLY case where a fee will be paid via credit card.** All other fees and charges **MUST** be invoiced and will be paid via check.
 - a. In order to pay these fees, email IIE your username and password, website address, and any specific instructions IIE may need to make the payment on your behalf.
 - b. Once you receive a receipt, save it as “U.S. University Name, Date of charge, and Charge amount (\$)” and forward it to IIE with the subject line “BSWB Receipt”
 - c. Do **NOT** make any payments on your own, unless approved by IIE.

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E) Reimbursements

- 1) Do not make **any** payments without approval from an IIE employee. If you make payments without approval from IIE, **you will not be reimbursed**.
 - a. This includes housing deposits, application fees, course fees, etc.
- 2) Before you make any payments, please contact IIE first. Reimbursements are **ONLY allowed for expenses approved by an IIE employee**. If your reimbursement request is approved, you will be asked to complete a Reimbursement Form.

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F) Academic Training Stipends

- 1) **High-cost city stipends**- Please note that IIE does not administer the “high-cost city stipends.” IIE will send CAPES technicians a list of students’ summer locations in June, and students will receive their stipends in either June or July. Students must consult their CAPES Technicians if they have any questions or concerns about the designated high cost cities. If you are moving from a “high-cost city” to a “non-high-cost city” you may need to refund CAPES any high cost city stipends you received for the summer months. This will be managed at the discretion of CAPES. If you are unsure what is considered a “high-cost city,” please refer to <http://www.capes.gov.br/images/stories/download/legislacao/Portaria174-6dez2012-PagamentoBolsas.pdf>

- 2) **Stipend Amount**- the stipend amount you have received (or will receive) is based on the information you provided on the “[Request for Academic Training Approval](#)” form to brazilat@iie.org. Please see the chart below for more details about the portion you receive from IIE and the portion you receive from CAPES.

IIE Providing AT Stipends To Cover (see below)	CAPES (\$)	IIE (\$)	Total You should have Received (\$)
Housing & Meals	300.00*	570.00	870.00
Housing	300.00*	270.00	570.00
Meals	300.00*	270.00	570.00
N/A- Institution providing housing and meals	300.00*	0.00	300.00
* Please note this figure does not include the "high-cost city" stipend			

In addition to the monthly stipends mentioned above, which should be primarily applied towards housing and meals for May-August, you may also receive the following stipends **if you qualify**:

- a. \$1,320.00 “settling-in” stipend (one-time)
- b. \$400.00 travel stipend (one-time)

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- 3) **Summer Housing:** You are responsible for making your own housing arrangements for the summer months (May through August). If you have not already arranged your housing or received information about housing options from your AT provider, you should begin researching your options immediately. Resources include your AT provider, university/college international student offices, on- and off-campus housing offices, local newspapers, the Internet, fellow BSMP students, etc.
- a. **Finding Accommodation with your Academic Training stipends:** There are various types of accommodations (i.e., dormitory rooms, university-owned apartments, off-campus rooms or apartments). You may also have the opportunity to sublet a room or an apartment. A sublet is when the original tenant has to move out and finds someone else to move in and make the rental payments.
 - b. **Renting or subletting:** When renting or subletting a room or apartment you should consider the following:
 - i. Total cost: the monthly/weekly rate, including required deposits, utilities fees, internet/cable/phone connection charges, renter's insurance fees, parking fees, storage fees, etc.
 - ii. Payment schedule and options (check, money order, direct withdrawal, etc.)
 - iii. Penalties for breaking your lease or damages to the property
 - iv. Furnished vs. unfurnished
 - v. Location
 - vi. Transportation
 - vii. Move-in and move-out dates
 - viii. Additional points to consider:
 - 1. If you are unable to find long-term housing, you should make temporary arrangements prior to your arrival so you will have a place to stay the first couple of days.
 - 2. Read all information and leases, including addendums, very carefully and follow all instructions. Remember leases, even subleases, are legally binding documents.
 - 3. Return any housing applications immediately; do not wait.
 - 4. Find a roommate to help share the costs.
 - 5. Budget carefully and plan ahead at all times. Even if you plan on moving out in mid-August, you still might need to pay a full month's rent.
 - c. You will receive your Academic Training stipend for the entire period between the end of your spring classes and the beginning of your Academic Training, and should use this stipend to pay for any necessary housing during that time. No additional stipends will be dispersed for this gap period.

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- d. **Finding Accommodations and billing IIE (IIE pays for your housing directly)** - If your Academic Training takes place on or near a university campus that can provide housing, you can arrange housing with the university directly. If you are required to take a class in order to qualify for housing, you may register for one course (in your field of study) to take place during your approved Academic Training period. Please read Section “**J) Housing**” of the financial policies for more details.
- 4) For all questions regarding Academic Training policies and procedures, please visit the Academic Training webpage:
<http://www.iie.org/Programs/Brazil-Scientific-Mobility/Current-Students/Academic-Training>

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G) Stipends

- 1) As part of the scholarship, students receive the following funds directly from CAPES/CNPq.
 - a. Books and supplies –one time stipend of \$1,000.
 - b. Round-trip Airfare- fully covered.
 - c. One time “settling-in” stipend of \$1,300
 - d. Monthly stipend of \$300 (higher if you are in what CAPES deems a “high-cost” city- **See Section F-1**)
 - i. *Please note monthly stipends provided directly to you from CAPES/CNPq are meant to **assist** you with covering expenses other than those specifically specified in your Terms of Appointment. Examples include health insurance co-pays, deductibles or co-insurance; additional housing or dietary needs (beyond what your scholarship provides); transportation; and other personal expenses related to traveling during breaks, electronics, clothing, and personal incidental items. You should plan on bringing any personal funds available to you so that you can adequately cover these personal expenses. **It is essential that you carefully budget your BSMP monthly stipends and one-time program allowances as well as any personal funds available to you throughout your program.***

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H) Early Arrivals

- 1)** IIE will not cover your housing, meals, and insurance expenses prior to the start date of your program as stated in your Terms of Appointment. You are to arrive at your U.S. University at the start date of the program stated on your Terms of Appointment (TOA).
- 2)** If you arrive before your program start date, you will need to cover your meals, housing, and insurance expenses with your \$1,300 “settling in” stipend.
- 3)** If you are required to arrive at your University for an orientation or specific program prior to the start date of the semester as stated in your TOA, please have your University invoice IIE for your housing and meal plan during this time. DO NOT pay any fees, unless instructed by email from IIE directly to do so.

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I) Term Breaks

- 1) Most U.S. Universities have extended breaks (winter/spring) that can last several weeks and may require you to make alternate housing and food arrangements. You should seek guidance from the international student services office on your campus to make appropriate plans. Please note that it is your responsibility to pre-arrange housing and meals, and email bswbpayment with your arrangements, at least two week prior to the start of the term break.
- 2) Stipends during the break periods are decided in concordance with CAPES/CNPq and may vary amongst semesters and cohort groups. These stipend amounts are determined by many factors. You will be informed of these amounts and procedures at the appropriate time.
- 3) It is important that you **budget** your settling-in stipend (\$1300) and monthly stipends **carefully** in case additional funding is not provided during breaks.
- 4) **UPDATE:** At this time, CAPES has determined that Spring break stipends will **NOT** be issued. Please seek guidance from your advisor in order to make appropriate arrangements and budget the stipend amounts you have already received carefully.

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J) Meals

- 1) **Meal Plan:** You should select the option that provides **21 meals/week**. If this is not an option, you are approved to purchase extra dining points to ensure 21 meals/week. If there are no options for 21 meals/week, you can choose the unlimited meal plan if your University offers it.
- 2) **Meal Plan Payment:** IIE **CANNOT** make payment for meal plans with a credit card or electronic check. Please request that dining services send IIE an invoice to IIE for your meal plan charge (preferably included with your semester charges).
 - a. **Please note:** Meal plans consisting of only campus cash are **not** allowed. Campus cash will only be provided to supplement the meal plan for students that do not have 21 meals/week (or equivalent in dining points). Make sure to contact IIE prior to adding dining points (or campus cash). **Failure to follow this procedure may render you fully responsible for the additional charges.**
- 3) **Additional Meals:** If your University does not provide a meal plan that will give you 21 meals/week, you must inform IIE immediately so that the proper adjustments can be made to ensure you will have enough meals during the semester.
 - a. **Please note:** IIE will not provide you with additional funds for meals to your meal plan account as the semester concludes. You must budget your meals carefully. The only time that IIE will adjust your meal plan is during the **first 30 days of your program start date as stated on your TOA**. You are responsible for choosing a proper meal plan and contacting IIE during the first 30 days if your meal plan will not provide you with 21 meals/week for the semester.
- 4) **Unspent dining points (or remaining balance on meal plan)-** Please note that the primary purpose of the meal plan (and additional dining points if you qualify to meet the 21 meals per week) is meant for meals. Any unspent meal plan funds should be refunded directly to IIE.
- 5) **Meal Plan for Off-Campus Residents:** If you are living off-campus, you are to enroll in an on-campus meal plan. IIE understands that living off-campus and eating on-campus might be difficult, but at this time, **meal plan stipends will not be provided.**
- 6) **Food Allergies:** If you have food allergies, you will need to inform your University official and provide IIE with a U.S. Physician's note stating this. Once you have provided the documentation for IIE, you are approved to have your University invoice IIE for a specialized meal plan that can accommodate your specific needs.

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K) Housing

- 1) **On-Campus:** All on-campus housing options selected must be **double-occupancy rooms (shared rooms) with shared living accommodations at the standard-rate** offered at your University. Bathrooms and kitchens should be shared if you are living in a suite-style housing arrangement.
 - a. **Please note:** If there are no double-occupancy rooms available, you may live in a single room on-campus. However, you must provide proof via email from your University saying that there are no double-occupancy rooms available and receive approval from IIE before you are allowed to live in a single room.

- 2) **Single Rooms:** You are **NOT** allowed to live in a single room unless you fit one the exceptions below:
 - a. There are no more double-occupancy, shared rooms at the standard rate available at your University, and you are required to live in a single room. (If this is the case, you must provide email proof from your University stating that a single room is the only option available to you.)
 - b. You have an extreme circumstance that requires you to live in a single room and you have received approval from IIE to do so. Please email nsavot@iie.org if you fit this criterion.
 - c. You have received approval from IIE and have paid the extra housing charge BEFORE IIE is invoiced for your housing. In this case, you must obtain approval from IIE before you make the arrangement. Once you receive approval, you have to pay the extra fee and show documented proof via receipt and from your University saying that you have made the payment before IIE is invoiced.

- Please note:** If you live in a single room and you have not received approval from IIE, then **YOU ARE FULLY RESPONSIBLE** for the difference in cost from a standard, double occupancy, shared room.

- 3) If you would like premium housing options that deviate from IIE's standard housing requirements such as luxury apartments, duplexes, single bedrooms and so forth, **YOU** will be responsible for the extra housing charge. **You must pay for the difference in price from the standard room BEFORE the University or the company providing you with housing invoices IIE.**

- 4) **Off-Campus:** If on-campus housing is **not available**, inquire about the University's off-campus housing options. Please contact the Residential Office/Housing Office on campus to assist you with finding local accommodations. You may only live off-campus if your University provides documented proof that there are not on-campus housing options available.
 - a. The housing arrangement should be **fully furnished**, e.g. desk, desk chair, bed, and living room couch.
 - b. Students may reside in singles **ONLY** if double occupancy is not allowed and with IIE's approval.
 - c. IIE will **NOT** cover broker fees or any other fees related to the search of a housing arrangement.

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- 5) **Lease Agreements**: IIE will cover all housing deposits, utilities, and rent as required by the University or the facility providing you with the appropriate accommodations.
- a. **On-campus housing**: IIE will pay the University directly for your room upon receipt of an invoice from the University.
 - b. **Off-campus housing**: Please have the rental agency or management company send IIE a billing statement for the term or calendar year depending on the terms of your lease agreement. **Please note IIE will NOT make monthly payments on your behalf. It is important that the housing provider can invoice IIE PER TERM OR YEAR.**
 - i. Inform the rental agency or management company that **the lease agreement will be signed by the student, not IIE**. IIE's legal department can provide a legal document, the "Lease Side Letter", as a substitute for signing the lease. The Lease Side Letter states that IIE will make payment for rent, utilities, deposits and application fees on behalf of the students.
 - ii. IIE will **NOT** cover Renter's Insurance.
 - c. **Utilities**: It is important that the housing arrangement you choose includes utilities and internet. **IIE will not be able to pay for utilities and internet on a monthly basis**. Please request that the rental agency or management company includes the utility fees in their rental invoice.
- 6) **Premium (non-standard) Housing Arrangements**: If you would like premium housing options that deviate from IIE's standard housing requirements such as luxury apartments, duplexes, single bedrooms and so forth, **YOU** will be responsible for the extra housing charge. **You must pay for the difference in price from the standard room BEFORE the University or the company providing you with housing invoices IIE.**
- 7) **Maximum Limit for Rent**: There is no maximum amount for off-campus housing. However, you should be housed in the standard housing arrangement, shared room (single only if shared rooms are not possible) with shared living accommodations. IIE **WILL** double-check to ensure students have found living accommodations that are affordable (average price as compared to local rent charges) and not premium.
- 8) **Moving In**: As it is stated in your Terms of Appointment, **gap periods and the process of "settling in" should be covered by the \$1,300 stipend you received for this very purpose**. As a reminder, IIE cannot provide any funding to host families. Have your U.S. University assist you with arranging hotel stay or more cost-effective measures for visitors.
- 9) **Household Needs**: Expenses for living supplies, for example: linens, dishes, cleaning products, and toiletries, are to be paid for with your "settling in" stipend of \$1,300. IIE will not cover these expenses.

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- 10) Fines or Fees:** IIE will **NOT** cover any fine(s) or fee(s) for: damage to the property, lost keys, lost access cards, lock changes, etc. If you incur any fine(s) or fee(s) for the foregoing, you are responsible for covering those costs.
- 11) Transferring Rooms:** You are not allowed to transfer rooms unless you have an **URGENT** case. All non-urgent cases without sufficient support will be dismissed.
- a. If you choose to change to a premium housing arrangement and receive approval from IIE, you must pay the difference in the price of the room and show IIE proof of payment before you are allowed to move.
- 12) Housing Refunds:** If you have your housing paid up front for the academic semester, or year, and are moving away temporarily (i.e. for summer coursework at another institution or for Academic Training), it is your responsibility to seek out a possible refund directly from the housing provider (your US Institution or off-campus housing provider). The refund should be made payable to the “Institute of International Education” and mailed to the address below:

*Institute of International Education
ATTN: Finance-2nd Fl.
Brazil Scientific Mobility Program
809 United Nations Plaza
New York, NY 10017-3580*

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L) Health Insurance

- 1) If you have any questions about your host institution's health insurance plan, or the health care that will be available to you, you should feel free to contact your host institution's Health Center/Student Services Office. If your host institution's Health Center/Student Services Office cannot assist you, please free to contact the BSMP Insurance team at BSWBinsurance@iie.org.
- 2) Please make arrangements to receive health coverage directly from your University.
- 3) If your University or insurance company cannot invoice IIE directly or your current health insurance coverage does not meet the J-1 requirements, inform IIE immediately and we can provide insurance for you through our private insurance company.
- 4) Check with your insurance provider and your host institution's Health Center/Student Services Office to make sure your health insurance meets the J-1 visa regulations set forth by the U.S. Department of State. For more detailed information about the BSMP policy on health insurance and J-1 visa health insurance coverage requirements, please visit the BSMP insurance webpage. <http://www.iie.org/Programs/Brazil-Scientific-Mobility/Current-Students/Health-Insurance>.
- 5) Please note that your program scholarship only covers the cost of **ANNUAL** health insurance. Please review the insurance guidelines provided to you by your University to understand the details of the insurance.
- 6) **IIE does NOT cover copays, deductibles, prescriptions, vaccinations, emergency hospital visits, or dental bills.** We recommend that you visit your on-campus health facility to learn more about insurance coverage.
- 7) If your Brazil University needs proof of insurance before you arrive at your U.S. University, you will need to contact your U.S. University health department. Contact your student advisor and have them assist you with this process.

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M) Pre-Academic Students (Summer Intensive English Students)

- 1) For all questions and concerns regarding the Pre-Academic program (Intensive English program), please email **brazilpreac@iie.org** directly.
- 2) You can find more information on the webpage below:
<http://www.iie.org/Programs/Brazil-Scientific-Mobility/Current-Students/Intensive%20English>

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N) Sending Emails

- 1) Send all billing related emails to bswbpayment@iie.org.
- 2) When sending emails, **please use the procedure below. If you do not follow the email procedure below, your email will be returned to you** and you will be asked to resend following the instructions below.
- 3) Please use the subject titles provided below in the “Subject” line of your email.
 - a. **Application Fees**: For questions regarding application fees, the subject of the email should be “**Brazil App Fees**”. Please provide your login information and website in the email.
 - b. **Tuition Fees**: For questions regarding tuition payments, the subject of the email should correspond to the semester you are emailing about:
 - i. Spring semester- “**Brazil Spring**”
 - ii. Summer semester- “**Brazil Summer**”
 - iii. Fall semester- “**Brazil Fall**”
 - iv. Winter semester- “**Brazil Winter**”
 - c. **Housing/Leases/Meals**: If you have a question about housing, meals, or need a Lease Side Letter, please send an email with the subject “**Brazil Housing**”.
 - d. **Health Insurance**: Please send all insurance related questions to BSWBinsurance@iie.org.
 - e. **Financial Guarantee**: If your University or housing provider requires a financial guarantee, the subject of the email should be “**Brazil FG**”.
 - f. **Receipts (Proof of Payment), Reimbursements, EFT**: If you need to send a receipt of payment approved by an IIE employee or if you have questions about a reimbursement or electronic funds transfer, the subject of the email should be “**Brazil Receipt**”.
 - g. **Stipends**: For questions regarding stipends, please send an email with the subject “**Brazil Stipend**”.
- 4) In the body of your email, please follow the format below and include the following information (failure to do so will only delay IIE in processing your request).

Name:

IIE ID Number:

U.S. University:

CNPq or CAPES: (note if you are a CNPq or CAPES student)

Reason for email: (keep emails brief and to the point)