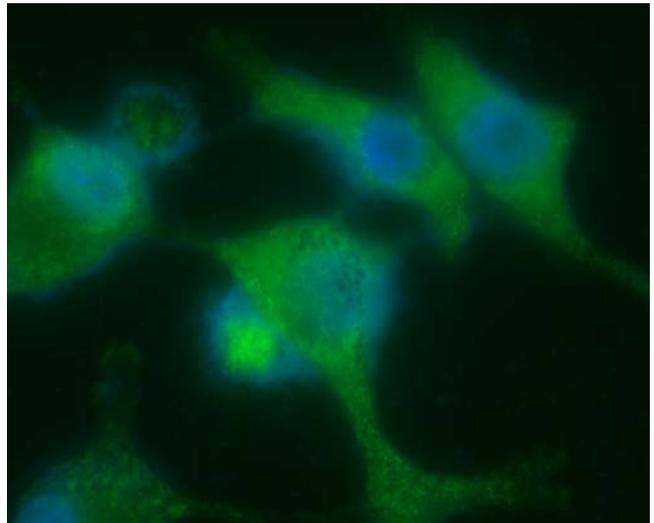
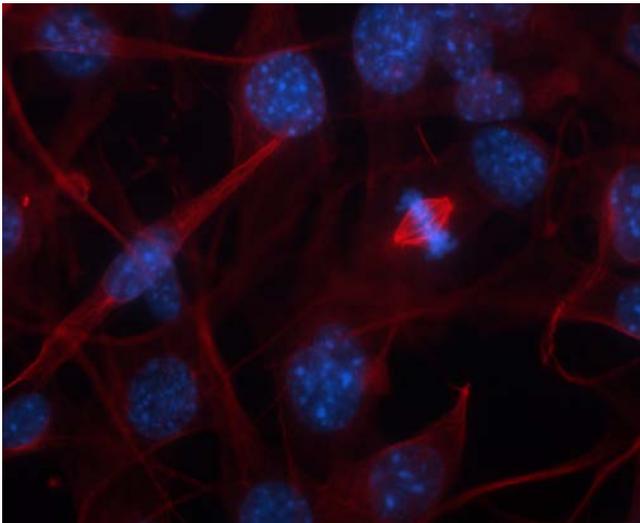
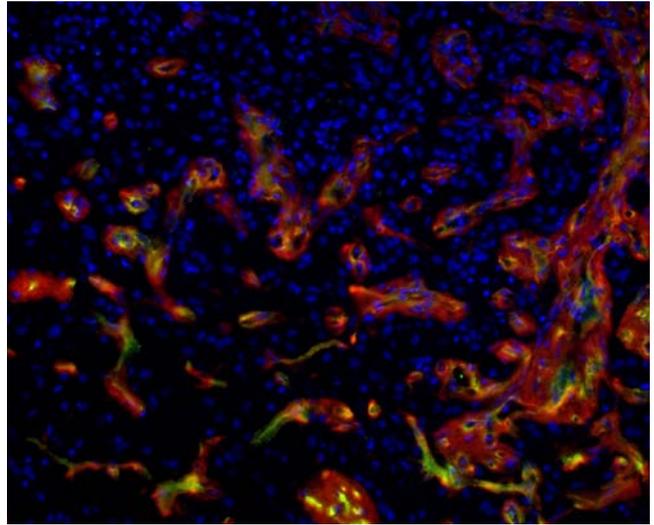


# 2018

Information for Medical Fellows and Fellowship Institutions

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Medical Research Fellows Program  
for Medical, Dental, and Veterinary Students

**hhmi** | Howard Hughes  
Medical Institute

Department of Science Education

# Program Policies and Procedures for Fellows and Fellowship Institutions

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## Medical Research Fellows Program for Medical, Dental, and Veterinary Students

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HHMI's medical fellowships are awarded to students enrolled in medical, dental, and veterinary schools located in the United States and are intended to strengthen and expand the nation's pool of physician-scientists.

Fellowships are awarded annually to provide support for one year of full-time training in basic, translational, or applied biomedical research. The fellowship includes a stipend, a research allowance for enrichment activities that directly benefit the fellow, for scientific conference travel costs, and for some of the fellow's research-related expenses; and a fellow's allowance to be used for health care and education-related expenses incurred by the student during the fellowship year.

Information on the fellowship program and eligibility requirements is available at [www.hhmi.org/medfellowships](http://www.hhmi.org/medfellowships).

# Program Policies and Procedures for Fellows and Fellowship Institutions

## TERMS AND CONDITIONS

Fellows and their fellowship institutions agree to use grant funds provided under this program in a manner that conforms to

- the Terms and Conditions document that is signed by representatives of HHMI and the fellowship institution;
- the policies and procedures set forth in this information booklet and in any further documents provided by HHMI; and
- all applicable HHMI policies and procedures.

*Fellows and fellowship institutions are urged to review the information in this booklet carefully and to consult it before calling HHMI with any questions.*

Fellowship institutions are responsible for complying with all relevant laws, including those relating to the receipt and disbursement of grant funds from HHMI. This includes responsibility for any reporting or withholding of funds as required by federal, state, or local laws and regulations.

HHMI reserves the right to terminate a fellowship if the requirements set forth in the Terms and Conditions document and this information booklet, as well as any other requirements that HHMI may determine to be necessary, are not met. If a fellowship is terminated, all required reports must be submitted, and HHMI may ask that unused funds be promptly returned.

### **Janelia Research Campus and Partnership Initiatives.**

Fellows conducting their research at the Janelia Research Campus or those funded by partnership initiatives with HHMI (whereby another organization has entered into an agreement with HHMI to fund a number of Fellows in a certain research area) should refer to the Terms and Conditions document and acceptance agreement pertaining to that initiative for specific policies related to their fellowship.

## LOCATION OF STUDY

Fellowship research must be conducted at an academic or nonprofit research institution in the United States, excluding the National Institutes of Health or other government agencies. The fellowship institution need not be the fellow's medical, dental, or veterinary school. Fellows are responsible for making all arrangements for attendance at their chosen institutions. A fellow may engage in research away from the fellowship institution (including a non-U.S. research institution) during the fellowship term if, in the research mentor's judgment, such an arrangement would

further the fellow's training. The fellow's mentor must be employed by an academic or nonprofit research institution in the United States.

After each annual competition, HHMI notifies awardees and their fellowship institutions. In most cases, HHMI designates as the fellowship institution the host institution where the fellow is conducting the research. In cases where the student is conducting research at an affiliated hospital or research center, funds will be disbursed to the medical school.

## LOAN DEFERMENT

HHMI can complete loan deferment forms for fellows so that they are able to defer their loans during their HHMI fellowship year. Students should complete "education-related" deferment request forms and e-mail the scanned documents (PDFs) to Medical Fellows Program staff for completion.

## FELLOWSHIP ADMINISTRATION

Fellowship institutions are required to designate a fellowship officer, financial administrator, and payment administrator for the fellowship program (the same person may be designated for all three roles, if appropriate).

**Fellowship Officer.** The fellowship officer is the principal point of contact and award coordinator for the fellow, the financial administrator, the payment administrator, and HHMI staff on most matters relating to the fellowship program. Responsibilities include administering the non-financial aspects of the program consistently with policies set forth in the Terms and Conditions document, this information booklet, and any additional documents provided by HHMI, submitting copies of any public announcement about the grant and any required notices to HHMI, including resignations. The fellowship officer also confirms dates for fellowship completions and which fellows, if any, are on leave.

**Financial Administrator.** The financial administrator is the primary contact for HHMI, the fellowship officer, the payment administrator, and fellows on all financial matters relating to the fellowship program. The financial administrator is responsible for submitting the mentor-approved certification of participation form by October 31 for each HHMI medical fellow stating that the fellow has worked full-time for the period for which he/she received support, and the amount of unspent funds, if any. In addition, the financial administrator is responsible for notifying HHMI of any change in the tax or other legal status of the fellowship institution.

**Payment Administrator.** The payment administrator is responsible for the receipt and distribution of fellowship grant funds from HHMI. This includes forwarding the institution notification e-mail letter to the appropriate offices at the fellowship institution.

**Change of Fellowship Officer, Financial Administrator, or Payment Administrator.** HHMI must be promptly notified if there is a personnel change in any of these roles. A written request to HHMI from one of the previously designated administrators is required along with a revised designation of administrators form, submitted via e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org).

HHMI will notify the fellow of the names and roles of the fellowship officer, financial administrator, and payment administrator. The fellow should direct questions about fellowship matters to the appropriate person at the fellowship institution before contacting HHMI.

**Arrangements for Fellows from Other Medical, Dental, or Veterinary Schools.** If the fellowship institution is not the fellow's own medical, dental, or veterinary school, the fellowship officer must ensure that arrangements are made to provide the fellow with access to resources comparable to those available for other medical, dental or veterinary students academically enrolled at the fellowship institution. Such resources may include library privileges, an e-mail address, Internet access, parking, and eligibility for group health insurance. It is also recommended that fellows have an advisor at their own school with whom they can consult during their fellowship year.

**Terms and Conditions Document.** For newly designated fellowship institutions (i.e., those that have previously not hosted an HHMI medical fellow), a Terms and Conditions document and an HHMI grant ID number for each medical fellow are transmitted to the official suggested by the fellow's mentor. An official at the fellowship institution must sign the Terms and Conditions document, which incorporates by reference the policies and procedures detailed in this information booklet and in any further documents provided by HHMI.

Appendices to the Terms and Conditions document are used to designate the fellowship officer, financial administrator, and payment administrator.

Any new medical fellows at a fellowship institution in subsequent years will receive new grant ID numbers, and they will be covered under the most recent Terms and Conditions document.

**Transfer of Fellowship to Another Institution.** Fellows may transfer to another eligible institution only with the written approval of HHMI. The request letter, which

may be sent by e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org), must name the proposed new fellowship institution and department, specify the reason(s) for the change, and provide a transfer timetable. If relevant, the name of the new mentor must be indicated and the new research plan described. Transfers will be considered on a case-by-case basis. A transfer will usually be approved if the fellow's mentor moves to a new institution. The fellow is responsible for informing the fellowship officers, financial administrators, and payment administrators at both institutions involved in the transfer.

If HHMI approves the transfer of a fellowship, the original fellowship institution must refund to HHMI the *cumulative* remaining balance of the stipend and allowances no later than one month after the effective date of the transfer. HHMI will then transfer the funds to the new fellowship institution.

A fellow may study or engage in research away from the fellowship institution during part of the fellowship term if in the mentor's judgment such an arrangement would further the fellow's research training. This is not considered a change of fellowship institution.

## SCHOLARLY ACTIVITIES

**Area of Research.** During the fellowship year, fellows must be engaged full-time in basic, translational, or applied biomedical research. Eligible fields include the following:

Biochemistry	Mathematical and computational biology
Bioinformatics <sup>1</sup>	Microbiology
Biophysics	Molecular biology
Biostatistics	Neuroscience
Cell biology	Pharmacology
Developmental biology	Physiology
Epidemiology <sup>2</sup>	Structural biology
Genetics	Virology
Immunology	

**Major Change in Research Plan or Change in Research Mentor.** A major change in the research plan or a change of research mentor after the fellowship award is accepted requires the approval of HHMI if the fellowship is to be continued. Minor changes in the research plan do not need HHMI approval.

1. For purposes of fellowship eligibility, health services research, such as computerized diagnosis or treatment algorithms, is not included in bioinformatics.

2. Research directed toward an understanding of biological factors relevant to disease distribution in populations or of associations with biological factors that may suggest causal influence and/or prevention strategies.

Fellows must request approval from HHMI in writing and notify the fellowship officer of this request. The letter must include, as appropriate, the proposed new department, mentor, or research plan, along with the reason(s) for the request and a timetable for the change.

The new research plan should be in the same format as the research plan submitted in the original fellowship application. The research mentor must cosign the letter to indicate endorsement of the new proposal. If the new research plan is not approved, the fellow must resign the fellowship.

Under very limited circumstances, a proposed change in mentor may be considered by HHMI. The proposed new mentor must provide both a letter indicating willingness to serve as the fellow's research mentor and the information required in the Mentor's Endorsement section of the fellowship application.

**Publications.** Fellows are wholly responsible for the conduct of research and the preparation of research results for publication within the guidelines established by their fellowship institutions. An acknowledgment of HHMI support must appear in any publication that is based on the fellowship research. A suggested format for the acknowledgment follows:

*Jane/John Doe is/was a Howard Hughes Medical Institute Medical Research Fellow.*

Fellows should promptly notify HHMI when forthcoming publications are accepted so that HHMI can use this information in its print or Web publications. A copy (electronic copies or links to articles are acceptable) of all publications derived from research carried out during the term of the fellowship must be provided to HHMI via e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org).

**Intellectual Property Rights.** HHMI claims no rights to any products, materials, inventions (or associated patents), or writings that might result from research supported by its fellowship awards. Fellows should be aware, however, that the federal government or other parties may acquire such rights through other support for particular research.

**Responsible Conduct of Research.** Fellows are expected to have completed a Responsible Conduct of Research (RCR) course prior to, or at the beginning of their fellowship year; and to conduct their research in compliance with all applicable laws, regulations, and policies regarding protection of human research subjects, humane care and use of laboratory animals, and laboratory safety.

**Allegation of Scientific Misconduct.** If an allegation of scientific misconduct is brought against a fellow, the fellow will be subject to the procedures in place at the

fellowship institution. The fellowship institution must notify HHMI's vice president for science education of both the allegation and the procedures that the fellowship institution will follow to inquire into the allegation. HHMI's vice president for science education must be notified of the outcome of these inquiries.

### **DURATION OF FELLOWSHIP TERM**

The fellowship term is 12 consecutive months of full-time research, whether or not the fellowship institution is in session, and any short vacation periods normally scheduled at the institution.

Fellows' vacation time during the fellowship year should not exceed one week. Fellows may not undertake medical, dental, or veterinary school coursework or clerkships, take time off to study for medical board exams, or serve as a teaching assistant (TA) during their fellowship year. However, they may receive academic credit for their research. Fellows may request permission from HHMI to take a graduate school course that is directly related to their research during the fellowship term.

The term for fellows must begin *no earlier than May 1 and no later than September 1* following notification of the award.

### **GRADUATION FROM MEDICAL, DENTAL, OR VETERINARY SCHOOL**

Fellows must notify HHMI of the completion of their medical, dental, or veterinary studies whether it occurs during or after the fellowship term (see "Completion of Fellowship," page 10, and "Career Updates by Former Fellows," page 10). They are expected to provide HHMI with information about residency match outcomes, as well as any new position or affiliation and contact information. Fellows who subsequently pursue a PhD degree are asked to inform HHMI of completion of that degree as well.

### **RESIGNATION OR TERMINATION OF FELLOWSHIP**

Fellows who terminate research training or fellowship-related activities at the fellowship institution before the expected end of the fellowship term are considered to have resigned. Fellows must notify HHMI (by e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org)), the fellowship officer, the financial administrator, and the payment administrator in writing of their intention to resign the fellowship, the effective date of the resignation, and the reason for the resignation.

Interruptions resulting from serious illness, disability, long-term family care, military service, jury duty, or other approved leave do not constitute resignation (see “Temporary Interruption of Fellowship,” below). The fellowship institution may hold fellowship funds, which are to be used by the fellow on return to fellowship activities.

A stipend is to be paid only for those months during which the fellow is engaged in full-time research. For a fellow who resigns or otherwise terminates research training before the expected fellowship end date, the unpaid portion of the stipend must be refunded to HHMI within two months of the resignation. If a fellow resigns or otherwise terminates research training in the first six months of a fellowship year, half the amount of the annual allowances must be refunded to HHMI.

### TEMPORARY INTERRUPTION OF FELLOWSHIP

Research under the fellowship is expected to be continuous. However, a leave of absence will normally be approved for serious illness, disability, long-term family care (e.g., birth or adoption of a child, serious illness of a family member, or death of a family member), military service, and jury duty. Arrangements should be consistent with the policies of the fellowship institution. Requests will be considered on a case-by-case basis. ***Fellows on approved leave will not receive support from HHMI during that period;*** however, provisions may be made for reservation of a fellowship (or the balance of it) and for reinstatement of the unused portion at a later date.

Fellows are responsible for notifying HHMI and the fellowship officer as soon as they become aware of the need to take leave from their research. Fellows must make their requests in writing before the start of a period of leave. The letter requesting leave must indicate

- the reason leave is requested;
- the expected period for which leave is requested; and
- the arrangements that have been made with the fellowship institution for this period.

The letter must be cosigned by the mentor. Otherwise a separate letter from the mentor is required for HHMI approval of leave.

### Illness, Disability, or Long-Term Family Care.

In the event of serious illness, disability, or long-term family care (e.g., birth or adoption of a child, serious illness of a family member, or death of a family member) that prevents full-time fellowship activity, the fellowship institution is responsible for making arrangements that are consistent with its general policies for dealing with such events. Generally, HHMI will approve such leave.

**Military Service or Jury Duty.** A brief interruption of a fellowship for authorized military service or training or for certain activities in lieu of service with the regular armed forces will be permitted. Leave for jury duty will also be permitted.

**Other Leave.** A leave of absence for other reasons, for a period generally not to exceed one year, may be granted, depending on the particular circumstances. Requests will be considered on a case-by-case basis.

**Vacations.** Fellowships do not specifically provide for a vacation period during the fellowship term. However, fellows are entitled to short holidays observed by fellowship institutions, such as winter holidays, but total vacation time in addition to official holidays should not exceed one week. Holiday time may not be accumulated for later use. If a fellowship institution should close for a long time, the fellow is expected to make arrangements for the use of facilities necessary to carry out the research supported by the fellowship award. If this cannot be done at the fellowship institution, the fellow should make arrangements to carry out the research elsewhere.

### STIPEND AND ALLOWANCES

The fellowship includes a stipend, a research allowance, and a fellow’s allowance to be used for costs incurred by the fellow. There are no dependency allowances, and HHMI does not provide supplemental funding during the fellowship term.

Indirect costs (F&A) are not covered with this award. Fringe benefit rates or employer-related costs such as FICA and Medicare (employer’s portion), worker’s compensation, unemployment insurance, and similar costs shall not be charged to this award. Visiting Student Researcher rates or other costs for fellows conducting research at an institution other than their own school cannot be charged to this award. Medical Fellows funded through partnership initiatives or at the Janelia Research Campus should refer to the Terms and Conditions and acceptance agreement for their fellowship for specific policies related to their stipend, allowances, etc.

**Payment Mechanism.** HHMI provides funds to the fellowship institution, which then pays stipends directly to fellows according to a schedule established by the fellowship institution.

HHMI makes one lump-sum annual payment for all medical fellows at each fellowship institution. Electronic payment is made in June on behalf of fellows receiving support for that fellowship year. Students are responsible for covering their own expenses, or making arrangements with their laboratory to temporarily provide stipend payments to them until the HHMI award set-up and payment process is completed by the fellowship institution. Depending upon the fellowship institution, stipend payments may not be made until 4–8 weeks after the start date.

Notification of electronic payments, along with a list of fellows covered by the payments, are sent to the designated financial administrator (the fellowship officer and payment administrator are courtesy copied). If the fellowship institution is not the fellow's own medical, dental, or veterinary school, the financial administrator at the fellowship institution will make the stipend, fellow's allowance, and research allowance available to the fellow at the fellowship institution.

Fellows and mentors should contact the financial administrator for information about the fellowship institution's established schedule and procedure for stipend payments and for drawing on other allowances. Payments are suspended for fellows on approved leave.

**Stipend.** For all fellows, the 12-month stipend during the 2018–2019 grant year will be \$32,000. HHMI will make a one-time direct payment to each student of \$5,000 of the stipend in May. The balance of the stipend in the amount of \$27,000 plus the fellow's and research allowances of \$5,500 each will be disbursed to the host institution in early June. Fellows funded by partner organizations will not receive the one-time direct payment from HHMI; the annual stipend of \$32,000 will be disbursed with the allowance funds to the host institution. Stipend payments may not begin until the fellow has started full-time research in the laboratory. Stipends are paid only for those months during which the fellow is engaged in research full-time.

**Research Allowance.** On behalf of each fellow, HHMI provides an annual research allowance of \$5,500, which should be used for research-related enrichment activities that directly benefit the fellow, including travel to scientific conferences, Medical Fellows Program kick-off and regional meetings, an HHMI investigator science meeting, and for the Medical Fellows Program

end-of-year meeting at the AAP/ASCI/APSA Joint Meeting in Chicago in April. Economy air or train fare, lodging during conference meeting days, registration fees, and out-of-pocket expenses incurred in traveling to/from each meeting (e.g., ground transportation to/from airports or train stations; parking, meals during business travel times) may be reimbursed from the research allowance account. Fellows should reserve at least \$1,500 of research allowance funds for end-of-year meeting expenses. The fellow should develop a travel budget for the year, taking into account required meetings, and should monitor the balance in the research allowance account.

Fellows are expected to attend one scientific conference related to their research during their fellowship term, particularly as a presenter. The HHMI administration views conference attendance as an important component of the research training experience. After consulting with their mentor, fellows should advise HHMI of their conference attendance plans.

While the research allowance is primarily for professional development and research-related travel and enrichment activities, and the mentor is primarily responsible for covering research costs, the research allowance may be used for consumable supplies and small pieces of equipment (less than \$1,500) specifically needed for the fellow's project, *after* allowing for the fellow's costs for travel to the required kick-off and end-of-year meetings, regional meetings, an HHMI investigator science meeting, scientific conferences and other research-related enrichment activities.

The research allowance is not meant for the purchase of general laboratory equipment or supplies for the mentor's laboratory. Prior approval from HHMI and the fellow's mentor must be obtained in advance for any purchase over \$1,500, travel expenditures exceeding \$1,500, and for any travel outside the continental U.S. or international travel. HHMI support for travel outside the continental U.S. or international travel is limited and requires that the fellow be presenting and submit additional information to HHMI with the approval request. HHMI will not fund more than \$2,000 in support of such travel.

The research allowance may not be used for the purchase of office supplies, computers, computer equipment, software, camera, audio or video equipment, cell phones, or any related accessories.

**Fellow's Allowance.** On behalf of each fellow, HHMI provides the fellowship institution with an annual fellow's allowance of \$5,500. The first priority for the use of this allowance is health insurance (medical, dental, and vision insurance) and health care expenses

for the fellow. If the fellow chooses, it is also permissible to use the fellow's allowance for tuition and registration fees within the fellowship term (e.g., for one graduate course per semester specifically related to the fellow's research, with advance approval from HHMI), and research allowance-related expenses that directly benefit the fellow. It is not permissible to use any funds in the award for tuition or registration fees toward any professional degree, except to the extent that students are required to maintain their matriculation at their medical, dental, or veterinary school. The fellow should work in collaboration with the fellowship institution to determine appropriate uses for the fellow's allowance portion of the grant funds and to monitor the balance available.

The fellow's allowance may not be used to pay for tuition or fees at an institution that a fellow visits for a brief period of research. If the fellow is conducting research at a fellowship institution that is not his or her home medical, dental, or veterinary school, the fellow's allowance may be used to cover reasonable travel and moving expenses to and from the fellowship institution up to \$1,500 roundtrip. Prior approval by HHMI must be obtained for all moving expenses.

The fellow's allowance may not be used for the purchase of office supplies, computers, computer equipment, software, camera, audio or video equipment, cell phones, or any related accessories. Other examples of inappropriate uses of the allowances include payment for the fellow's internet connection at home, reimbursement of commuting costs to the fellowship institution, travel expenses to residency interviews or medical board exam sites, medical board exams fees, medical, dental, or veterinary school textbooks, and any other expenditures not directly related to his or her research training. Please send an e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org) if there are any questions regarding the appropriate use of the allowances.

Remaining funds from the research allowance may not be used to supplement expenses that fall within the fellow's allowance.

**Supplementary Income.** Fellows are not permitted to supplement the stipend or allowances through private employment or consulting work, nor may they receive funds from another external fellowship, scholarship, or similar award. However, the fellowship institution may supplement the stipend in accordance with its usual policy for comparable students. Pay received by a fellow for occasional attendance at military reserve or National Guard functions is exempt from these limitations on supplementation of the fellowship stipend.

**Purchases.** Ownership of laboratory equipment is determined by the fellowship institution's usual policies governing such purchases. Any purchase over \$1,500 must be approved by the mentor and HHMI. HHMI support for laboratory equipment over \$1,500 is very limited as the research allowance funds are intended to be used for research-related enrichment activities and some of the fellow's laboratory supplies rather than major equipment purchases.

**Changes in Stipend and Allowances.** HHMI will advise financial administrators, fellowship officers, and fellows of any changes in the amounts of the stipend and allowances at the time of the June payment; that payment will reflect the changes. Information about changes may also be obtained by consulting the program announcement for the medical fellowship competition, which is updated annually and available on the Web at [www.hhmi.org/medfellowships](http://www.hhmi.org/medfellowships).

**Funds Remaining at the End of the Fellowship.** Often, a fellow and the mentor will choose to continue the research beyond the fellowship year. In this case, remaining funds will be made available by the fellowship institution to the fellow to continue the project. Permissible expenses include:

- (1) support of the fellow's travel (e.g., if the fellowship institution is not the student's home school) and stipend to continue his/her research in the mentor's lab during elective time;
- (2) funding for the fellow's travel to a scientific meeting to present the HHMI-supported research of the fellow;
- (3) purchase of consumable supplies for the fellow's research project; and
- (4) pre-acceptance publication costs relate to the HHMI-supported research.

Residual funds may not be used for any other expenses. If the remaining funds cannot be applied to one or more of the activities specified above, then the fellowship institution agrees to return the remaining funds to HHMI immediately after the fellow graduates from medical, dental, or veterinary school.

Medical Fellows funded for a second year in the program may carry-over funds not expended in their first year in the program without approval from HHMI.

#### **CONTINUED SUPPORT FOR A SECOND YEAR**

In the spring of the initial year of research training, fellows may apply for continued fellowship support for a second year of full-time research. The second-year fellowship provides the same level of funding (stipend, research allowance and fellow's allowance) as the first year fellows. Only a small number of these fellowships will be awarded. They are made only when a second year of research training will significantly further the

research experience of the fellow. Fellows who will be enrolled in a combined professional degree/PhD program or PhD program are not eligible to apply.

HHMI encourages fellows interested in continuing their research for a second year to seek funding from their principal investigator or other sources in the case that they do not receive an HHMI second year award.

Application information and requirements will be provided to fellows in January and applications will be due in April.

## TAX AND OTHER LEGAL CONSIDERATIONS

**Income Tax.** Under the Internal Revenue Code, income received as a scholarship or fellowship must generally be included in gross income for federal income tax purposes, unless the funds are used for tuition and enrollment fees or for books, supplies, and equipment required for instruction. Fellows are responsible for establishing the amount of their taxable income and for making any required payments of estimated tax.

To assist fellows in understanding their tax liabilities, fellowship institutions are expected to provide each fellow with a statement of amounts paid to or on behalf of the fellow. The statement should include detail that is sufficient to enable fellows to report their taxable income properly. Financial administrators are expected to ensure that fellows receive appropriate information about income taxes.

Fellows should consult with their fellowship institutions on any questions they may have about income tax matters, including federal, state, or local income taxes for which they may be liable. Fellows who are not U.S. citizens or nationals may also consult Internal Revenue Service (IRS) publication No. 519, U.S. Tax Guide for Aliens, available from the IRS website at <https://www.irs.gov/pub/irs-pdf/p519.pdf>.

The following IRS publication contains further information that may be of interest to fellows: Publication 970, Tax Benefits for Education. This publication can be downloaded from the IRS website at <https://www.irs.gov/pub/irs-pdf/p970.pdf>.

**Accounting and Audit.** The fellowship institution must record the receipt of fellowship funds, together with any expenditures related to the fellowship, in a manner (e.g., in a separate ledger account) that enables HHMI to verify that the funds received have been expended for the purposes for which the fellowship was awarded. Records pertaining to each fellowship award, along with copies of relevant financial reports submitted to HHMI, must be retained in the

fellowship institution's files for three years after completion of the fellowship. HHMI reserves the right to audit these records during and after the term of the fellowship or to have an audit conducted by independent auditors.

## REPORTING: FELLOW'S RESPONSIBILITIES

**Current Contact Information.** For the duration of the fellowship period, a fellow must provide current mailing addresses (home and lab), e-mail addresses (school and personal), telephone numbers (home and lab), and the name, address, and phone number of a permanent contact person (someone who is likely at any time to know the fellow's current address). Once the fellowship term begins, the fellow must notify HHMI promptly, preferably by e-mail ([medfellows@hhmi.org](mailto:medfellows@hhmi.org)), of any name or mailing address change, as well as of any change in the permanent contact information.

**Completion of Fellowship.** At the end of the fellowship term, fellows must complete an exit survey online and provide current contact information (professional address, telephone number, and e-mail address) to program staff.

**Career Updates by Former Fellows.** In accepting the award, fellows agree to update HHMI at least annually after the fellowship term about residency match outcomes as well as any new position, affiliation, or contact information (especially an e-mail address). The information helps HHMI assess the effectiveness of the fellowship program and inform former fellows about relevant HHMI programs. Updates should be made via e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org).

**Notification of Change in Fellowship Status.** Fellows are responsible for notifying HHMI and their fellowship officers, financial administrators, and payment administrators regarding changes in status (see "Transfer of Fellowship to Another Institution," page 5; "Area of Research," page 5; "Graduation from Medical, Dental, or Veterinary School," page 6; "Resignation or Termination of Fellowship," page 6; and "Temporary Interruption of Fellowship," page 7).

## REPORTING: FELLOWSHIP RESPONSIBILITIES

**Certification of Participation.** The *financial administrator* at the fellowship institution must submit the mentor-approved certification of participation form for each medical fellow who has received HHMI support by October 31 of the year following notification of the fellowship award. The financial administrator should collaborate with the appropriate office at the fellowship institution and ensure the timely completion and return of the form to HHMI via e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org).

Failure to report the remaining balance on the mentor-approved certification of participation form by the deadline date may result in the institution being eliminated from future award designations.

**Change in Nonprofit Status.** The *financial administrator* must notify HHMI immediately of any change or expected change in the fellowship institution's status as a nonprofit organization exempt from federal income tax.

## OTHER MATTERS

**Scientific Meeting of Medical Fellows.** All fellows are required to participate in the entire end-of-year meeting, April 5–7, 2019, to be held in conjunction with The Association of American Physicians (AAP)/ American Society for Clinical Investigation (ASCI)/ American Physician-Scientists Association (APSA) Joint Meeting in Chicago. They must give a poster presentation on their fellowship research project to ASCI members. Before the meeting, fellows must submit written abstracts to ASCI and HHMI of the research to be presented at the meeting. The fellow's mentor is expected to have reviewed and approved of: (1) the abstract prior to submission; and (2) the poster presentation prior to the meeting.

Medical Fellows' abstracts will be posted on the HHMI website at [www.hhmi.org/medfellowships](http://www.hhmi.org/medfellowships).

Students will be reimbursed for economy air or train fare, lodging, registration fees, and out-of-pocket expenses (e.g., ground transportation to/from airports or train stations; parking, meals during business travel times) from the research allowance account at their fellowship institution. HHMI will arrange for hotel accommodations for fellows at AAP/ASCI/APSA Joint Meeting-related conference hotels in Chicago.

In late fall, fellows will receive an e-mail that provides detailed information about the 2019 meeting. Abstracts for the meeting will be due in January 2019.

**Relationship with HHMI.** HHMI's relationship with the fellow and the fellowship institution is solely one of financial support of the fellow. No employer-employee or principal-agent relationship is created through participation in the fellowship program. HHMI assumes no responsibility for the research activities supported by the fellowship program or for research findings or their interpretation.

In addition, HHMI assumes no liability or responsibility in connection with any fellowship, other than the responsibility for making fellowship payments in

accordance with HHMI's policies and procedures. For example, HHMI assumes no liability or responsibility to any fellow or the fellow's dependents for any compensation for injury, disability, or death of the fellow during the term of the fellowship or during travel to or from the fellowship institution or meetings; and HHMI assumes no liability or responsibility for the payment of compensation for a fellow's involvement in any accident or incident that causes injury to other persons or damage to property.

The offer and acceptance of a fellowship do not obligate either the fellow or HHMI in any way with regard to employment or service of any kind in the future.

**Public Announcement and Attribution.** The fellowship institution may make a public announcement of a fellowship award. A copy of any press release or public announcement should be provided to HHMI via e-mail to [medfellows@hhmi.org](mailto:medfellows@hhmi.org).

In any reports, articles, or documents regarding HHMI's medical fellowship program, the full name "Howard Hughes Medical Institute" must be used. HHMI is a medical research organization, not a foundation, and must not be referred to as a foundation in any context.

**Outreach.** Each fall HHMI sends e-mail announcements on the fellowship program to medical, dental, and veterinary school deans and administrators and asks that the information be publicized and made widely available to interested faculty and students. The program announcement can be downloaded from the Web at [www.hhmi.org/medfellowships](http://www.hhmi.org/medfellowships).

## CONTACTING HHMI PROGRAM STAFF

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## Howard Hughes Medical Institute

[www.hhmi.org](http://www.hhmi.org)

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The Howard Hughes Medical Institute plays a powerful role in advancing scientific research and education in the United States. HHMI's program in biomedical research rests on the conviction that scientists of exceptional talent, commitment, and imagination will make fundamental discoveries for the betterment of human health if they receive the resources, time, and freedom to pursue challenging questions. The Institute's science education program supports initiatives with the power to transform education in the life sciences for all students. Our objectives are to recruit and develop talented students who will be the future leaders of science and science education, and to promote scientific literacy among all students. Just as today's researchers solve complex questions by working across scientific disciplines and integrating tools from these disciplines, HHMI seeks to support science education by integrating a variety of tools and approaches that will engage students in science.