POSTDOCTORAL FELLOWS HANDBOOK
Welcome from the Dean

Welcome to Simon Fraser University!

In choosing to attend Simon Fraser University — a university which opened in 1965 with a campus that is now recognized as architecturally significant, and which grew to have campuses in downtown Vancouver and in Surrey — you are coming to a welcoming University noted for being student-centred, research-driven and community engaged.

As a Postdoctoral Fellow at Simon Fraser University you will join a community of 5,000 graduate students and postdoctoral fellows from over 100 countries, a global fabric that reflects SFU’s diversity. You will have the opportunity to further your intellectual development and career opportunities at a university that has a strong academic and community history and is internationally recognized and ranked as one of the top institutions in the world.

Despite this scale, every student and Postdoctoral Fellow is valued, and encouraged to excel in their chosen discipline, both on and off the campus. You will be supported academically and challenged intellectually and given every opportunity to develop and circulate your research. At the same time, we hope the SFU ethos of engaging with the world, and thinking through local contexts and knowledges inspires you. Within this global context, it is significant that SFU is located on unceded, traditional and ancestral Musqueam, Squamish, and Tsleil-Waututh territories: we are honoured to live and work on these Coast Salish lands.

Welcome to SFU. I trust you will make the most of your postdoctoral experience and make the university itself a better place.

Sincerely,

Dr. Jeff Derksen, PhD
Dean and Associate Provost
Graduate and Postdoctoral Studies
Professor of English
Simon Fraser University

Contact Information

The Postdoctoral Fellow Coordinator is usually your first point of contact for most questions related to your postdoctoral appointment.

Email: postdoc@sfu.ca
Website: www.sfu.ca/dean-gradstudies/postdocs.html
Office Hours: Tuesday and Thursday, 12:00 pm – 4:00 pm (Pacific time), MBC 1500

If you need additional assistance, please contact the staff in the Graduate and Postdoctoral Studies (GPS) office; Maggie Benston Student Services Centre 1100, Simon Fraser University, Burnaby campus.
about SFU

Located in Canada on British Columbia’s west coast and named for an early explorer, Simon Fraser University opened on September 9, 1965 with 2,500 students.

Noted Canadian architects Arthur Erickson and Geoffrey Massey designed the original Burnaby Mountain campus to foster interdisciplinary contact between students and researchers. That same openness and desire to innovate forms SFU’s current vision: to be Canada’s most community-engaged research university.

Now boasting three distinctive campuses, 30,000 students, 6,500 faculty and staff, and 130,000 alumni, SFU has matured into one of the world’s leading teaching and research universities.

Consistently ranked among Canada’s top comprehensive universities and named to the Times Higher Education list of 100 world universities under 50, SFU is also the first Canadian member of the National Collegiate Athletic Association, the world’s largest college sports association.

Postdoctoral Fellows (PDFs) are valued members of the SFU community.

As a postdoctoral fellow, you will be able to broaden your research expertise, build associations with established researchers and strengthen your publication record, thereby enhancing your future employment opportunities. You have the opportunity to make significant contributions to your chosen field, alongside faculty researchers and graduate students.

Postdoctoral fellows will have completed a doctoral degree, normally within the previous four years, and are planning to undertake advanced research at Simon Fraser University. They usually work in association with one or more SFU faculty members for a fixed period of time, usually one to three years.

Simon Fraser University: Strategic Vision

To be the leading engaged university defined by its dynamic integration of innovative education, cutting-edge research, and far-reaching community engagement.

ENGAGING STUDENTS

To equip SFU students with the knowledge, skills, and experiences that prepare them for life in an ever-changing and challenging world, SFU will foster supportive learning and campus environments. Combining the best traditions of academic and teaching excellence, SFU will provide students with diverse and transformative learning opportunities that enable them to gain the knowledge, critical capacities, research skills and civic understanding required to become engaged global citizens and to thrive and adapt in demanding and dynamic environments. Students will have opportunities to participate in advanced research, thereby sharing in the labour and joy of creating and applying knowledge, while acquiring the skills for lifelong learning. Students will have access to an unparalleled selection of experiential learning opportunities that allow them to apply knowledge, grow as individuals, to engage with diverse communities, to develop entrepreneurial skills and to refine their sense of civic literacy.

ENGAGING RESEARCH

To be a world leader in knowledge mobilization building on a strong foundation of fundamental research. SFU will leverage its fundamental research strengths, including interdisciplinary research, close community connections, and partnerships and collaborations to become a global leader in research mobilization. SFU will support and promote the full continuum of research, from the fundamental generation of knowledge, through the dissemination of that knowledge within the academic community and beyond, to the application of transformative ideas for the benefit of society. SFU will promote research excellence, supporting and encouraging all researchers, including undergraduates, graduate students, faculty, staff members and community partners who assist the research mission. SFU will seek opportunities to transfer the results of its research to the broader society, including policy-makers, civil society leaders, and the community.

ENGAGING COMMUNITIES

To be Canada’s most community-engaged research university. SFU will maintain and expand its community connections as an integral part of its academic mission, creating opportunities for practical and experiential learning; informing and inspiring research; and contributing to its relevance and success. SFU will develop partnerships and maximize the capacities of its three campuses to enhance the social, economic, environmental and cultural well-being of communities both locally and globally. The university will build respectful and mutually beneficial community relationships. SFU will meet the lifelong learning needs of students, alumni and the community, and will respond with innovative programs and learning opportunities for academic, personal and professional development. SFU will be BC’s public square for enlightenment and dialogue on key public issues, and will be known as the institution to which the community looks for education, discussion and solutions.

UNDERLYING PRINCIPLES

In addition to the above, SFU commits to the following underlying principles:

Academic and Intellectual Freedom - SFU will be an open and inclusive university whose foundation is intellectual and academic freedom.

Diversity - SFU will foster a culture of inclusion and mutual respect, celebrating the diversity and multi-ethnic character reflected amongst its students, staff, faculty, and our society.

Internationalization - SFU will value international knowledge, understanding and engagement, and will seek to engender an active global citizenship among its students, faculty and staff, and to ensure that SFU is an engaged partner and contributor on the international stage.

Respect for Aboriginal knowledge, culture and influence - SFU will honour the history, culture and presence of Aboriginal peoples. The university will welcome and nurture Aboriginal students and seek opportunities for greater representation of Aboriginal peoples amongst its faculty and staff.

Supportive and Healthy Work Environment - SFU will recognize, respect and value the essential contribution made by staff and faculty, and will seek to build and sustain a work environment that is equitable, supportive, rewarding and enjoyable.

Sustainability - SFU will pursue ecological, social and economic sustainability through its programs and operations. Through teaching and learning, research and community engagement, SFU will seek and share solutions. In its own operations, it will develop and model best practices, from minimizing its ecological footprint, to maximizing its social health and economic strength.

2.0 Definitions

There are two types of postdoctoral fellows at SFU: External PDFs and Grant PDFs, depending on their funding source. It is vital that staff and faculty members who assist PDFs administratively understand the difference between the two types, as the administrative procedures for the two types of PDFs are different.

Welcome to Simon Fraser University

Canada’s most community-engaged research university, with three thriving urban campuses.
1. “External PDFs receive their stipends either directly from an external agency or through SFU from funds that are provided to SFU by an external agency for administration on behalf of that agency, via ‘global payments.’ The terms of appointment, including remuneration, are normally set by the external agency (Policy R50.03).”

External PDFs are viewed as trainees or non-employees. Faculty will use a Letter of Invitation to begin the SFU administration of these PDFs.

External PDF earnings are not insurable. Canada Pension Plan and Employment Insurance contributions will not be deducted. However, External PDF earnings are subject to Canadian income tax deductions. A T4A will be generated at year end. Please see the tax section of the handbook.

2. “Grant PDFs receive their compensation from research grants or contracts (‘grant funds’) awarded to SFU faculty members (‘grant holders’) and, under SFU Policy R50.02, are considered to be employees of the grant holder (i.e. they are ‘grant employees’), with the funds administered on behalf of the grant holder by SFU.

The source of the grant or contract funds can either be external or internal to the University. The terms of the appointment of Grant PDFs, including remuneration and benefits, normally are set by the grant holder.

Grant PDFs, although not employees of the University, are employees of the grant holder (i.e. Faculty Supervisor) and can be viewed as employees. Faculty will use a Letter of Appointment to begin the SFU administration of these PDFs.

Grant PDF earnings are subject to Canada Pension Plan, Employment Insurance and Canadian income tax deductions. A T4 will be generated at year end.

### 3.0 SFU Relevant Policies for Postdoctoral Fellows

At SFU, postdoctoral fellow appointments are governed by two policies: Postdoctoral Fellows Policy R. 50.03 and Employment of Personnel Funded from Research Policy R 50.02.

1. Policy R. 50.03 outlines the following appointment procedures for all Postdoctoral Fellows:
   - Definitions
   - Terms and Conditions of Appointment
   - Conflict Resolution
   - Recruitment, Appointment/Invitation Procedures

2. Policy R. 50.02 provides general appointment guidelines for hiring Grant Postdoctoral Fellows.

   Please see the SFU Policy Gazette for a complete listing of all SFU research policies.

### Equity

The University is committed to the principle of equity in employment. (See Policy GP 19.)

### Privacy

The information submitted with your application is collected under the authority of the University Act (R.S.B.C. 1996, c.468, s.27(4)(a)), applicable federal and provincial employment regulations and requirements, the University's non-academic employment policies and applicable collective agreements.

The information is related directly to and needed by the University to initiate the employment application process. The information will be used to contact references supplied by you, evaluate your qualifications and complete the employment process by making a hiring decision. Applicant information may also be disclosed to the Teaching Support Staff Union in accordance with Article XIII F.3.1.b of the Collective Agreement.

If you have any questions about the collection, use and disclosure of this information please contact the Associate VP, Human Resources, Simon Fraser University, Burnaby, BC V5A 1S6. Telephone 778-782-3237.

### Ethics & Intellectual Property

All research plans involving human subjects must receive ethics approval. See policy R20.01. Copies of the policy, procedures and forms for this review may be obtained from the Office of Research Services.

Research at SFU is conducted under the general authority of the Vice President, Research who administers several relevant University policies; for further information on these policies, consult the Office of the Vice President, Research. For more information and policies, please see [http://www.sfu.ca/dean-gradstudies/faculty/ethics-ip.html](http://www.sfu.ca/dean-gradstudies/faculty/ethics-ip.html)

Intellectual property is an increasingly contentious issue at Canadian universities, the patent/ copyright/fair use landscape appearing to be in a state of flux legally. SFUFA is in principle committed to the sharing of knowledge freely, and expanding the reach of open access and fair use provisions, but recognizes, too, that in a time of increased commodification of knowledge academic staff must defend their rights over their own intellectual work. Members are strongly encouraged to review any contracts with the University or third parties carefully to ensure their rights as creators and scholars is protected.

The following provides only a brief summary of some of the core principles members ought to consider.

In most workplaces, as a matter of general law, intellectual property produced in the course of employment belongs to the employer. In universities, however, it is generally accepted that an ‘academic exception’ reverses the presumption of ownership – that is, while in other places the presumption is that the employer owns the product of work unless there is an agreement to the contrary, in the university sector the courts will generally presume the creator to be the owner unless there has been an explicit assignment of rights to the university. This is most certainly the case for what might be termed ‘literary works’ – articles, books, conference proceedings, lecture notes and course plans. In those areas where scholarship often takes the form of an invention rather than a literary work, the situation becomes much more complicated, as the law recognizes inventions as potentially commercialized products in which the university, like other employers, has made a specific investment and is entitled to some portion of any profits earned.

As a generality, members can use the following rule of thumb to determine whether intellectual property is fully their own, or might be legitimately open to the university’s interest:

- books, journal articles, presentations, classroom materials and the like are wholly owned by the member(s) who create them and the university has no claim on these materials and cannot compel them to be used or shared in any particular way;
b) inventions – i.e. anything produced that is under patent rather than copyright – are a distinct category of scholarly production; the fact of their potential commercialization opens patented materials to university interest, and members are required to comply with university policy as regards the patent process, commercialization, and sharing of revenues that may be earned.

4.0 Postdoctoral Fellow at SFU

4.1 Registration, SFU ID and email set up

In order to ensure that PDFs have access to university services and facilities as soon as they arrive, it is important to complete a PDF registration form before their start date. Their supervisor is responsible for completing this form. The form must then be submitted to the Office of Graduate and Postdoctoral Studies (email at postdoc@sfu.ca) along with a copy of the Letter of Appointment or Invitation.

Graduate and Postdoctoral Studies can generate SFU ID numbers even before PDFs are set up for payroll, which then allows PDFs to organize an SFU email account immediately and avoid potential delays. Financial Services will use the same number our office generates when they set up the PDF on payroll.

All PDFs need to register and complete a registration form. This applies to both domestic and international PDFs as SINs (Social Insurance Number) are not required on the Graduate and Postdoctoral Studies registration form.

Registration also will ensure the PDF will be notified of upcoming professional development opportunities. You should start receiving emails from the official postdoctoral mailing list (post-docs@sfu.ca), which will provide you with access to the library, gym and other facilities.

4.2 Health Insurance & Benefits

It is recommended that international postdocs purchase health insurance to cover them for the 3-month waiting period for MSP. There is a university code which gives people a slight discount when purchasing a plan through Guard Me. Please email to postdoc@sfu.ca to request the code.

Offering health benefits to postdocs is optional. Many SFU postdocs do not receive health benefits because Tri-Agency regulations prohibit health benefits as an eligible expense for holders of research grants, in cases where the options are discretionary. Because the Postdoctoral Policy, R50.03, gives supervisors the option to offer them (i.e. are discretionary), they are not an allowable expense. Many faculty supervisors who hold Tri-Agency grants (SSHRC, CIHR, NSERC) are not able to offer these benefits.

4.3 Social Insurance Number

• A Social Insurance Number (SIN) is a 9-digit number required for employment in Canada. When you receive your work permit and arrive in Canada, you can apply for your SIN in person from a local Service Canada office. Download instructions (pdf).
• Note: if you have to renew your work permit you must apply for a new SIN.

4.4 Moving to BC

• british Columbia newcomer’s guide to resources and services
• Find temporary accommodation
• Find off-campus housing
• City of Vancouver: guide to moving to Vancouver
• Set up a bank account or cellphone account

Check out our Virtual Orientation for more campus-specific tips on transportation, schooling & childcare, and much more.

4.5 Bringing Family

• If you wish to bring your family, they will need to apply individually for the correct status (Temporary Resident Visa, study permit or work permit). However, if applying by paper, you may send all family member application forms in the same envelope with only one payment receipt for the total amount.
• Spouses and common-law partners of postdoctoral fellows (with employment contracts that are longer than six months) are eligible to apply for open work permits without the need for pre-arranged employment (see the IRCC website for further details).
• It is recommended that any school-age children (ages 5-18) obtain study permits (see Minor Children Studying in Canada). (Tip: In order to qualify for provincially-funded education at either the elementary or secondary level, most school boards require that the parent has a work permit for at least 12 months in duration, or international fees may apply. Check with the appropriate school board in the district where you will be living in advance.)

4.6 Income Tax

Any earnings paid by Canadian Sources are subject to the regulations set out by the Canada Revenue Agency (CRA).

By law, deductions are taken from the salary for Canada Income Tax, Canada Pension Plan (CPP) and Employment
Insurance (EI).

By law, you must file a yearly tax return before April 30th. An income tax slip (T4 or T4A) is issued to you prior to the end of February each year.

You will need to file your tax return. Contact a financial advisor or the Canada Revenue Agency if you want tax and financial information. Check the CRA website for a self-directed online course on Learning About Taxes, this online course will explain the fundamentals of the Canadian tax system and how to file a tax return.

Questions about paying income tax in Canada? Refer to CRA’s information for non-residents or contact the International Tax Services Office:

Calls from Canada and the US: 1.800.267.5177
Calls from outside Canada & the US: 1.613.952.3741

**Collect calls are accepted**

Please ensure that your address is updated with SFU.

### 4.7 SFU Support Services

- IT
- Library
- Campus Security
- Teaching and Learning Centre
- Research Commons
- Freedom of Information and Protection of Privacy Office
- Human Resources Benefits Office
- Human Rights Office
- Meeting, Event and Conference Services
- Recorded Information Management
- SFU Childcare Society
- SFU Tech Shop (part of Bookstore)

### 4.8 Transportation

Vancouver International Airport (YVR)

Before you arrive, check out the [Vancouver International Airport website](http://www.vancouverairport.ca) to get a detailed view of the airport arrival process from the airplane to the arrivals area and ground transportation.

The British Columbia Visitor Centre is located inside International Arrivals and is open 24 hours a day. This centre can give you information on:

- Transportation options to Vancouver and SFU
- Accommodation in the area
- Purchasing long-distance phone cards
- Tourism information for Metro Vancouver

Getting to SFU - Translink

**BC TransLink - Skytrain/Rapid Transit Train, Bus and Seabus**

Use TransLink’s online Tripplanner to find the fastest and easiest transit route to your destination. The Tripplanner will also let you know the fare you will need to pay and the approximate travel time.

YVR Airport to Downtown Vancouver/SFU’s Vancouver campus: Take Canada Line train from Airport station to Waterfront station downtown.

YVR Airport to SFU’s Burnaby campus: Take Canada Line train from Airport station to Waterfront station; take 95 SFU bus from Hastings St/Granville St stop to the Burnaby campus.

YVR Airport to SFU’s Surrey campus: Take Canada Line train from Airport station to Waterfront station; take Expo Line to Surrey Central Station (Surrey).

Note: You might want to consider alternative transportation options if you have a lot of luggage.

Getting to SFU - taxi/limousine

**Limousine Services**

For more information on these services, follow the link.

**Taxi/Cab Services**

Taxis run on a meter, so prices will vary depending on trip length/traffic volume. A 15% gratuity/tip is typically expected in addition to the charge on the meter. A taxi to SFU’s Burnaby campus will start at approximately $65 with no traffic. For more information...

**Beaton’s Meet & Greet**

While we do not recommend any particular company, one company that people travelling to SFU campuses have used in the past is Beaton’s Meet & Greet.

This company is not endorsed by/affiliated with Simon Fraser University. The information is listed as a resource for people wishing to use airport pickup services. SFU assumes no liability for any disputes arising from services advertised here.

**Other transportation-related links**

- [BC TransLink](http://www.translink.ca)
- [Greyhound Bus Lines](http://www.greyhound.com)
- [SFU Maps and Directions](http://www.sfu.ca/maps.html)

Stay updated through our blog

Upcoming funding opportunities are posted at www.sfu.ca/grad/blog
Arriving at Abbotsford International Airport (YXX)

Tourism Vancouver

Tourism Burnaby

Tourism Surrey

5.0 Extending a Postdoctoral Fellowship

A new appointment (renewal) or any extension of the original dates needs to be communicated to Graduate and Postdoctoral Studies. The Supervisor should resubmit the PDF Registration Form alongside a revised Letter of Invitation (External PDFs) or Letter of Appointment (Grant PDFs) to ensure the PDF remains registered while at SFU. You must also notify Financial Services regarding payroll and HR to re-enroll in MSP and extended health benefits if offered. Coverage and re-enrollment is not automatic.

5.1 Postdoctoral Fellowship Opportunities

Postdoctoral Fellowship Funding Agencies:
- Canadian Institutes of Health Research
- Government of Canada — Banting Postdoctoral Fellowship (See SFU's internal procedures for Banting applications)
- Government of Canada — International Scholarships
- Michael Smith Foundation — Health Research Trainee Competition
- Mitacs: see the Accelerate and Elevate programs
- Natural Sciences and Engineering Research Council
- Social Sciences and Humanities Research Council

Sites Listing Current Postdoctoral Fellowship Opportunities
- The Canadian Association of Postdoctoral Scholars
- The University of British Columbia's Office of Postdoctoral Fellows

5.2 Applying for an extension of your Work Permit

Learn more about SFU Immigration Services.
- Apply early as the process can take months (see average times), or longer if you are informed by your visa office to do a medical examination and/or obtain police certificates
- Find the visa office responsible for the country or region where you live (see list of offices). US citizens and permanent residents of the US may apply for work permits at their port of entry into Canada (land border crossing or airport). Please contact postdoc@sfu.ca to enquire if you may be able to apply at the POE as citizens of countries who don't need visa to enter Canada may also apply for the work permit at the POE.
- Determine what documents you will need to apply online or through the Visa Application Centre (VAC) for your work permit. Typical documents required include (but are not limited to):
  - a valid passport (ideally valid for the duration of your stay)
  - a detailed letter of invitation from SFU which states the amount of remuneration, location, nature and expected duration of the term of employment
  - proof of funds (if your research funding is from a foreign source, proof of that needs to be submitted as part of the application)
  - official proof that you have successfully completed (or will shortly complete) the requirements for your doctoral degree in a related field.
- postdoc work permits do not require a positive labour market impact assessment (LMIA). If applying by paper, simply write exemption code C44 on the document checklist where it asks for the file number /positive labour market impact assessment from Employment and Social Development Canada (HRSDC). (see academic exemptions)
- Update: Starting February 21, 2015, employers hiring foreign nationals who are exempt from the Labour Market Impact Assessment (LMIA) process will be required to submit information about their business or organization, the offer of employment form, and pay an online fee of $230 to Immigration, Refugees and Citizenship Canada before the work permit application is submitted. (see the IRCC website for details). If you are have an appointment as an international postdoctoral fellow and are at the stage of applying for a work permit, please refer to your SFU department.
- If you need to renew your work permit while in Canada, you may do so online. We advise that you start the process 3 months in advance, if possible. If you need additional assistance, please email postdoc@sfu.ca
- Note: you need to renew your SIN number if you extend or renew your work permit.

5.2 Travel Tips: Applying for a new Temporary Resident Visa

- If you are a citizen of a country which requires a temporary resident visa (TRV or entry visa) in addition to a work permit, ensure it is valid for re-entry into Canada. (See list of countries)
- If you plan to travel outside of Canada or the US, you can apply for a new single or multiple-entry TRV at the visa office responsible for your home country, or by mailing your passport and application to the Case Processing Pilot in Ottawa. If possible, apply at least 2 months in advance of your trip to Canada. See the IRCC website.

See also: Blog posts related to postdoctoral fellows.

5.3 Applying for an extension of your Work Permit
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15 for instructions. A handout is also available on the international Services for Students' website. If you have questions, please email postdoc@sfu.ca.

6.0 SFU Postdoctoral Association (PDA)

A message from the SFU Postdoctoral Association (SFU PDA)

Welcome to SFU! We hope your transition to SFU as a postdoc will be smooth, whether you just graduated from SFU or if you have travelled around the world to get here!

The SFU PDA represents and advocates for all the Postdoctoral Fellows at SFU. We aim to improve the experience of Postdoctoral Fellows in the SFU academic community by means of advocacy, activities, support, and promotion. The SFU PDA executive committee works to build a strong community and we’d like to meet you and help you feel at home!

PDA activities:

• Coffee socials: We get together once a month to chat and share some laughs, experiences and questions. We love to meet new postdocs and this is an excellent opportunity for you to meet other postdocs. Coffee and Timbits are on us!
• Pub socials: We also meet at the pub monthly and sometimes hold joint events with UBC’s postdoc community. These are well attended and a huge success.
• Brown Bag lunch series: These are professional development workshops and seminars held once a month for you to expand and hone your skills. Topics include data visualization, presentation skills, you name it we have it!
• Postdoctoral Research Day: Showcase the way your research is changing the world in front of a multidisciplinary audience. Faculty members and other postdocs enjoy this annual event.

Stay informed about these events through our:

• Mailing list: post-doc-cafè@sfu.ca. Sign up by sending an email to maillist@sfu.ca with the message “subscribe post-doc-cafè” in the subject line. (No text is required in the body of the message).
• Email: sfu.postdoc@gmail.com
• Website: www.sfu.ca/postdocs
• Facebook: search for “SFU Postdoc Association”

To facilitate your transition to the SFU postdoctoral community, please consider the following:

• Make sure you receive emails from all the relevant mailing lists
• The official post-doc mailing list from the Office of Graduate Studies and Postdoctoral Fellows: post-docs@sfu.ca
• Contact the Office of Graduate Studies and Postdoctoral Fellows if you are not on this list.
• Our mailing list: post-doc-cafè@sfu.ca Send an e-mail to: maillist@sfu.ca with the message “subscribe post-doc-café” in the subject line. (No text is required in the body of the message). Please note that subscription requests need to be approved by the list’s owner.

Any lab and departmental mailing lists: ask your colleagues for these

• Register with the Office of Graduate Studies and Postdoctoral Fellows
• Get your university card at the Maggie Benson Centre to get access to the gym and library
• If eligible, apply for the BC Medical Services Plan (BC MSP), private health cover (Pacific Blue Cross) and dental at the HR office. You need to do this as it is not automatic and do it as soon as you reach British Columbia. It can take up to two months to issue and be covered by the BC MSP.
• Sign into https://fins.sfu.ca to check you are on payroll and financial contributions to your benefits are correct (e.g. Employment Insurance, Canada Pension Plan, and any health benefits).
• Attend our events to meet other postdocs!
• Sign up to be a member of the Canadian Association for Postdoctoral Scholars (CAPS). Its free, you hear about many job opportunities and they work with the PDAs across Canada to promote and advocate for postdocs: http://www.caps-acsp.ca/en/membership/

Please do not hesitate to contact us. We are here to answer questions and help out with your concerns.

7.0 Appendices

Appendix 1 - Types of Postdoctoral Fellowships at SFU

To become an SFU postdoctoral fellow you must first complete a PhD program. Postdoctoral fellows are normally appointed within four years of completing their PhD.

As a postdoctoral fellow at SFU, you will be associated with one or more faculty colleagues for the purpose of research collaboration. The supervising faculty member usually provides the resources needed to support the collaborative research activities.

There are two categories of SFU PDFs: External PDF and Grant PDFs (see the Definitions section 2 for more details).

External postdoctoral fellows receive their stipends either directly from an external agency or through SFU from funds that are provided to SFU by an external agency for administration on behalf of that agency. External PDFs do not have an employment relationship with SFU. They work independently under the mentorship of a supervising faculty member at SFU.

Grant postdoctoral fellows receive their compensation from research grants or contracts awarded to SFU faculty.
members. Grant PDFs, although not employees of the University, are employees of the grant holder (Faculty Supervisor) and can be viewed as employees.

Appendix 2 - How to Find a Postdoctoral Appointment

The first step in securing a SFU postdoctoral appointment is to contact a faculty member who matches your research interests. Each department should have a list of faculty members and their research topics and postdoctoral fellowship applications are made directly to a specific faculty member(s).

Where to Apply for Positions

- Check faculties/departments of interest to see if there are any postdoctoral fellows positions currently available at SFU
- Visit our list of local and external Postdoctoral Fellow Funding opportunities

Graduate and Postdoctoral Studies does not accept postdoctoral fellowship applications. SFU departments are responsible for appointing postdoctoral fellows after this consultation occurs.

Questions to Ask When Choosing a Supervising Faculty Member

- It is important to identify expectations at the beginning of the fellowship in order to ensure that it is a fit for both sides.
- Below are some of the questions that should be asked of a supervising faculty member when considering a postdoctoral fellowship at SFU:
  - What are the supervisor’s expectations of the PDF in terms of publications, work hours, independent research, teaching, supervision, other research responsibilities?
  - Will the supervisor or the PDF determine and lead the research project?
  - How many PDFs has this supervisor had? Where did they go afterward?
  - Can I contact current and past lab members about their experience? – Ask for email addresses or phone numbers
  - How will the relationship work?
  - How much time will the supervisor have for mentoring? Will there be other mentors?
  - How many others (grad students, staff, PDFs) currently work for the supervisor?
  - What is the expected publication rate and to which journals?

Appendix 3 - Letter of Appointment or Invitation

All PDFs require a letter regardless of their funding arrangement.

External PDFs receive a Letter of Invitation and Grant PDFs receive a Letter of Appointment. The letter outlines the PDFs relationship to the University, and what benefits they may or may not receive. The faculty supervisor must write a Letter of Appointment or a Letter of Invitation to the PDF.

According to Policy R50.03:

- One faculty member must be designated as the Faculty Supervisor. Simon Fraser University requires that an Appointment/Invitation Letter be sent by the prospective Faculty Supervisor to the prospective Grant PDF or External PDF; the letter must include:
  a. position title
  b. starting date and term of appointment

What will your role be on publications?
- What is the supervisor’s policy on travel to meetings?
- What is the supervisor’s policy on authorship and ownership of ideas?
- What is the supervisor’s policy on vacations and leave?
- Will I have opportunities to practice grant writing? Oral presentations? Review of manuscripts?
- Will I have the opportunity to perform any teaching or mentorship? What will happen if I do not complete a project before I take another appointment?
- How long is financial support guaranteed? Are there opportunities for appointment renewal? On what does appointment renewal depend?
- Will the supervisor help in supporting my search for my next position?
- Will the supervisor have adequate research funds to support the proposed research?
- Will the supervisor offer to contribute (in full or partially) to the costs of health insurance and extended health insurance?

Modified from Enhancing the Postdoctoral Experience for Scientists and Engineering, A Guide for Postdoctoral Scholars, Advisers, Institutions, Funding Organizations, and Disciplinary Societies, National Academy Press, Washington, DC. For the complete text see The National Academies Press website.
c. remuneration (if not already specified by an external agency)
d. statutory and additional employment benefits (for Grant PDFs)

Please note: often the Letter of Invitation for an External PDF is missed, because there is a belief that the PDF has established an agreement with a funding agency, which is enough. This is incorrect. The PDF has established a funding relationship with the agency, yet the Faculty Supervisor must still establish a supervisory relationship (non-employment relationship) with the PDF. The Letter of Invitation should include the sentence “This is not an employment relationship” when the External PDF is funded entirely from an external source.

Appendix 4 - Payroll Set-up Process

The next step is to ensure the PDF will be paid. There are three possible processes to follow at this stage, depending upon the PDF’s funding arrangement:

a. Department Managers (DM) will use a Payroll Appointment Form (PAF), as with any new employee, for all Grant PDFs (found here on payroll’s website: http://www.sfu.ca/finance/departments/payroll.html)

b. Some External PDFs will have their funding sent to them directly from the external funding agency. In this case SFU is bypassed altogether and there is no need to process this PDF through the payroll office.

c. Some External PDFs will have their external funding administered by SFU, if the funding agency chooses to have SFU administer the funds on their behalf. This process requires a Notification of Award – explained below.

Award Types

• As an External PDF is funded primarily through an external source. You can ascertain if this is an external award by answering YES to any of the following questions:
  • Is the external source funding the PDF directly (in their name) to continue to work on their own research? This may or may not be associated with a faculty supervisor or supervisor’s lab.
  • Does the award letter call the funds a stipend (and not employment income)?
  • Does the letter refer to the funds as an award?
  • Do they refer to the PDF as trainee (rather than employee)?

Here are examples of external agencies funding PDFs directly through external awards:

• ALS Canada
• Alzheimer Society of Canada
• BC Center of Excellence for Women’s Health
• Banffing Fellowship
• Canadian HIV Trials Network (CTN)

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• Kidney Foundation
• Michael Smith Foundation
• Technology Evaluation in the Elderly Network (TVN)
• Tri-Agency PDF Fellowships (some CIHR, NSERC & SSHRC awards)

When creating the Payroll Appointment Form (PAF) for an external award, please alert the payroll office by writing in the “Notes” section: “this is an external PDF award, and is not an employment relationship.” Read more here.

Mitacs Funding

Mitacs Elevate PDF awards do not fit in the standard categories of External or Grant funded, and require further explanation.

These fellowships, although described as awards, are considered grant funded at SFU due to the nature of the employment relationship. Because they are considered employment income, standard employee benefits (EI/CPP/WCB) will be deducted by payroll.

Mitacs recommends that the portion of employer-deductions not be deducted from the PDF’s grant, but instead come from either the Faculty Supervisor or from the materials/research portion of the Elevate award. But this situation must be negotiated between PDF and supervisor. Please see Mitacs’ FAQ (Is my Elevate award a Stipend or a Salary?)

There are two possible scenarios which govern how the payroll form (PAF) is created:

Scenario 1: The PDF has negotiated with his/her faculty supervisor to allow for employer-deductions to be paid by the supervisor or the materials/research portion of the award ($5,000). In this case the PAF should be prepared with the total cost of the award at $50,000.

Scenario 2: The PDF has not negotiated (or been unsuccessful in those negotiations), and the employer-deductions will be paid from the Elevate grant ($50,000). In this case the PAF should be prepared to receive the total cost minus the cost of employer-deductions, ~8%.

Have questions? Please write to postdoc@sfu.ca

Processing a Notification of Award

If a funding agency would like SFU to administer a PDF’s fellowship on their behalf, then the official Notification of Award (NOA) should be sent to Research Accounting at the following address:
A postdoctoral NOA will be processed by Jessie Wu in Research Accounting (jessie_wu_4@sfu.ca). Research Accounting must receive the original signed documentation, so please use inter-campus mail (do not send signed documents electronically).

Once a NOA is received, Jessie will need:

1. A copy of the application the PDF submitted to the external agency.
2. A complete and fully signed Non-Research Funding Application Signature Sheet (FASS), found here: http://www.sfu.ca/finance/departments/research-accounting.html.

The Department Manager will provide the following detail on the form:

- The PDFs name and the faculty supervisors name should both be recorded on the form.
- Under award type please write: “postdoctoral fellowship”.
- In the budget section, if the fellowship is solely for salary, you can add the total annual amount in the “personnel salary costs”. If the award includes a research allowance that allowance can be recorded as “other direct costs”. No other line items need to be filled out.
- The series of 11 checkboxes are not applicable to your fellowship (check “no”).
- In the Special Requirements box you may want to write “Postdoctoral Fellowship”.

Four signatures are required on the form. Please write the name, the position of the individual, and then a signature.

Four signatures are required (PDF, Supervisor, Departmental Chair, Dean of Faculty). There is no need for a signature from Legal Affairs. Research Accounting will sign as “Financial Services” once they have your form. As an example of the four necessary signatures:

Principal: xxxx, PDF, (sign);
xxxx, Faculty Supervisor, (sign)
Chair/Director: xxxx, Chair, (sign)
Faculty Dean: xxxx, Dean, (sign)

3. Once Research Accounting has received the NOA, the cheque from the agency, and the completed and fully signed FASS (Non-Research Funding Application Signature Sheet), the account will be set up. Both the Faculty Supervisor and the Department Manager will receive a memo from Research Accounting regarding the new account.

4. Usually the Department Manager or Department Assistant will fill out the Payroll Appointment Form (PAF). A copy of the External PDFs Letter of Invitation should be attached to the PAF and sent to Research Accounting. In the “Notes” (or comments section) of the PAF, the DM should write “This is not an employment relationship”; if this text is contained within the Letter of Invitation. For most External PDFs, the phrase “This is not an employment relationship” will be contained within the letter. This step is very important as it alerts the payroll team that this stipend should not be deducted CPP/EI, which an External PDF is not eligible for. Research Accounting will forward the PAF to the Payroll Office.

Also, in order to ensure the PDF is covered by Workers Compensation Board, please ensure to check the box indicating Employment Income and NOT Scholarship Income.

- Email postdoc@sfu.ca, in the Office of Graduate Studies & Postdoctoral Fellows for any questions regarding these procedures or questions related to PDFs in general.
- Contact Leann Liew, lhleew@sfu.ca, Manager, Research Accounting, for any inquiries related to the set up of the external fellowship funds.
- Contact Rose Gonzales, rosegonzales@sfu.ca, Payroll Manager, with any questions in filling out the PAF or other PDF payroll inquiries.

* Sometimes a PDF will receive a combination of grant funding and external funding. In these cases the DM would create two separate FPP4 for payroll. The PDFs Letter of Invitation should be attached to the FPP4 when it is sent to the Payroll Office.

To summarize:

- External PDFs may receive a cheque sent directly to them from the external granting agency (bypassing SFU administration altogether), or their fellowship may be sent to SFU to be administered as a bi-weekly stipend through the payroll office.
- Grant PDFs will always receive their bi-weekly salary through the payroll office (as any other employee would).