



Newsletter for Postdoctoral Fellows

March 9, 2009

Inside This Issue

- 1 What is a Postdoctoral Fellow?
- 2 Benefits
- 2 Level of Pay
- 2 Extensions beyond 3 years
- 3 Tax Matters
- 3 Immigration Information
- 4 Research Associates
- 4 News from Faculty Relations

*Have you visited our Postdoctoral Fellow website yet? If not, please check it out on the left side of the UBC home page:
www.ubc.ca*

What is a Postdoctoral Fellow?

Postdoctoral Fellows ("PDFs") are individuals who have completed a doctoral degree and who are seeking the opportunity to train further in a particular area of research. The appointment of PDFs is governed by *UBC Policy #61: Post Doctoral Fellows* found online at the following address: www.universitycounsel.ubc.ca/policies/policy61.pdf.

PDFs at UBC can be either employees or trainees, depending on the job description, level of direction and nature of the research grant.

**A PDF is an employee where the individual plays a key role on a research team under the direction of and funded by the supervising faculty member.

**A PDF is a trainee where the individual is awarded a competitive fellowship from an external granting agency, which may or may not be paid through UBC, or receives financial support from a sponsoring agency. Trainees do not have an employment relationship with UBC. They independently work under the mentorship of a supervising faculty member at UBC.

PDFs normally perform research. Some PDFs obtain teaching experience, which is a benefit to both undergraduate and graduate programs. In cases of formal assignment of teaching duties, the PDF will be given an additional appointment as a Postdoctoral Teaching Fellow.

PDFs may be involved in undergraduate and graduate lecturing, laboratory instruction, tutorials, supervision of undergraduate projects, and assistance with the supervision of graduate students. Postdoctoral Teaching Fellows are employees.

What kind of Postdoctoral Fellow are you?

Faculty Relations is actively looking at potential changes to our eligibility requirements for benefits and leaves

PDFs are welcome to attend grant writing, industry and ethics-related and research team management workshops hosted by VP Research. Workshops are posted on the Events Calendar found online at www.research.ubc.ca/calendar.aspx.

Benefits

UBC offers a benefits package to eligible PDFs which includes extended health (coverage in addition to the BC Medical Services Plan), dental and the Employee & Family Assistance Program.

Benefits eligibility currently requires that a PDF hold at least a 12 month appointment at 50% and meeting a monthly salary minimum of \$1,298. Salary refers to an employee's regular earnings and does not include fellowship earnings. PDFs who receive fellowship earnings are not employees and are therefore not eligible for benefits through UBC.

PDFs who are not eligible for the UBC benefit package are encouraged to make private arrangements for benefit plans with providers such as Sun Life (www.sunlife.ca/), Manulife (www.coverme.com/) or BCAA (www.bcaa.com).

PDFs are also eligible for maternity and parental leave. PDFs who received regular earnings can apply for Employment Insurance (EI) benefits and if eligible for EI, will also receive a salary top up to 95%.

Faculty Relations is actively looking at how we can change our eligibility requirements for benefits and leaves in order to provide for a consistent approach to PDFs in terms of their benefits and leaves. As you can imagine, any change to policy in an organization the size of UBC takes time and various levels of approval. We will keep all affected groups informed of these exciting changes.

Level of Pay

The level of pay for a PDF is dependent on the amount of the fellowship award or the amount a supervising faculty member can provide from a research grant. There are no minimum salary requirements, except for the purpose of establishing benefit eligibility for employees, and there are no maximum salary limits.

Extensions beyond 3 years

Typically PDFs are appointed for 1 year and are renewable up to 3 years. Extensions beyond the 3-year limit may be approved where there is a good reason. Requests for extensions must be made prior to the end of the 3rd year of appointment. A letter of explanation providing a justification for the extension from the supervising faculty member must be forwarded to Faculty Relations prior to confirming the extension with the PDF. Typical reasons for extending a PDF appointment include information about an ongoing research project, maternity, parental or sick leaves or a new fellowship. Extensions are only available in one-year increments.

Where extensions are not possible, the supervising faculty member can consider the option of appointing the PDF as a research associate if the PDF meets the requirements for that new position.

Tax Matters

While at UBC, any earnings received are considered Canadian income, unless otherwise indicated by Canada Revenue Agency (CRA) in writing prior to arrival. Earnings include regular salary and fellowship income.

Please note that by law deductions are taken from your salary for Canada Income Tax, Canada Pension Plan (CPP) and Employment Insurance (EI). If you receive fellowship earnings, these earnings will not be deducted for CPP and EI, which means you would not be eligible to access EI benefits.

T4s and T4As

In the spring of every year, you will receive T4 (if receiving regular earnings) and/or T4A (if receiving fellowship earnings) slips from UBC Payroll, which will be used to file your tax return.

You are able to view your statement of earnings paid (T4 and T4A slips) for the year 2008 through UBC Employee Self Service at: www.msp.ubc.ca.

Please ensure your forwarding address is up to date when you leave UBC.

Different taxation across Canada

Questions have been raised by a number of postdoctoral fellows about why there are different taxation models for postdoctoral fellows across Canada. The differences occur because some universities treat PDFs as students, whose fellowships are not taxed. Based on advice received from tax experts, UBC has elected not to use this approach.

Immigration Information

If you have a work permit, please be aware that you are required to renew your work permits if your appointment is to continue beyond the expiry of your current work permit.

You will receive a system-generated letter 4 months in advance of the expiry of your work permit reminding you of your work permit expiry date. A copy of this letter will also be sent to your academic unit. Upon receipt of the reminder, you must work with your academic unit to arrange the renewal of your work permit. It is important to start this process as early as possible since the process can be lengthy thus delaying the arrival of a work permit which has implications for medical coverage and your ability to travel outside of Canada. The steps involved in renewing a work permit are found online at

www.hr.ubc.ca/faculty_relations/immigration/renewal_of_work_permits.html.

Need help with filing your income tax?

Unfortunately, UBC cannot provide you with tax advice given the complexity of income tax and we are just not experts on these matters!

If you are a foreign postdoctoral fellow and you have any questions about paying income tax in Canada, please refer to CRA's information for non-residents (www.cra-arc.gc.ca/tx/nrrsdnts/ndvdl/nrrs-eng.html) or contact the International Tax Services Office at 1.800.267.5177.

You can also check the CRA website (www.cra-arc.gc.ca/tx/ndvdl/tpcs/lrn-tx/menu-eng.html) for a self-directed online course on "Learning about Taxes". According to the site, this online course has been developed to help you understand the fundamentals of the Canadian tax system and to teach you how to file a tax return.

There are also Volunteer Tax Preparation Clinics which provide assistance to those who don't know how to complete their income tax and benefit returns and are unable to pay for assistance. This is an important community service to individuals who have low incomes and simple tax situations. If this applies to you, you can find a clinic near you by checking the following website:

www.cra-arc.gc.ca/tx/ndvdl/vlntr/clncs/bc-eng.html

You can also contact a financial advisor or the Canada Revenue Agency directly for tax and financial information.

*Did you know that over
60% of our
Postdoctoral Fellows
are not citizens or
permanent residents of
Canada?*

Research Associates

Unlike PDFs who are seeking the opportunity to train further in a particular area of research, research associates are employees who primarily conduct research and are expected to be at the equivalent of an assistant professor. The appointments are one-year in length and are renewable without restriction.

The level of pay for a research associate is dependent on the amount available from a research grant or contract. There is a minimum annual salary level currently set at \$49,411.42 and will increase to \$51,140.82 as of July 1, 2009.

Research associate positions must be advertised and are eligible for a full benefits and pension package (if meeting the eligibility requirements). There are also additional immigration requirements.

More information about Research Associates is available online at www.hr.ubc.ca/faculty_relations/recruitmentguide/researchassociates.html.

News from Faculty Relations

Faculty Relations is looking at potential changes to UBC's policies and procedures in order to provide for a consistent approach to postdoctoral fellows in terms of their classification, taxation rates and benefits.

We are looking at ways to support postdoctoral fellows and their training needs at an institutional level.

This includes deciding where fellows should be housed administratively within the University and ensuring they know where to get reliable information and have an office to call if they have questions or experience difficulty.

Faculty Relations is also considering ways to promote existing professional development options and perhaps create new training opportunities for both postdoctoral fellows and supervisors.

Our goal is to ensure a quality experience and equitable treatment for all postdoctoral fellows at UBC while complying with applicable legislation and funding agency and institutional requirements.

As you can imagine, any change to policy in an organization the size of UBC takes time and various levels of approval.

We will keep all affected groups informed of these exciting changes.

The UBC Post-Doc Association was established in 2006 as a coalition of volunteer post-doctoral fellows and research associates with the goal of enhancing the post-doc experience at UBC in all aspects- personal, professional, and social.

For more information:

www.lsi.ubc.ca/postDocClub.php

This newsletter has been presented by Faculty Relations at UBC Vancouver and Human Resources at UBC Okanagan.

If you have any questions, please check out our Contacts webpage for information on who to call:

www.hr.ubc.ca/faculty_relations/contact.html