

# POST-DOCTORAL FELLOW PROCEDURES MANUAL

DESIGNED FOR THE

DEPARTMENT OF **PATHOLOGY AND MOLECULAR MEDICINE**  
FACULTY AND STAFF

## SO I HAVE A PDF CANDIDATE... WHAT NEXT?

To ensure the smooth hiring process of your potential Postdoctoral Fellow (PDF) candidate, the following is offered as a simplified guide.

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**STAGE 1: THE OFFER**

**STAGE 2: SIGN-IN PROCEDURES**

**STAGE 3: CHANGES AND/OR TERMINATIONS**


**NEED MORE INFO? VISIT THE McMASTER UNIVERSITY LINK:**

[http://fhs.mcmaster.ca/postdoctoral\\_resources/links.html#started](http://fhs.mcmaster.ca/postdoctoral_resources/links.html#started)

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Your Main PDF contact is:

**Jane Goad**  
HSC-3N26E

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[goadj@mcmaster.ca](mailto:goadj@mcmaster.ca)

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**IMPORTANT FACTS**

- \* **PDF'S ARE NOT ALLOWED TO EXCEED A COMBINED 6 YEAR TERM.** THIS INCLUDES TRANSFERS FROM OTHER UNIVERSITY DEPARTMENTS AND CONTRACT EXTENSIONS. A PhD degree or equivalent must have been awarded within 5 years preceding the initial McMaster University appointment.
- \* **PDF's WORK 35 HRS/WK.** THOSE HIRED FOR 12 MONTHS OR MORE, AND ARE PAID THRU THE UNIVERSITY PAYROLL SYSTEM, ARE ENTITLED TO ENROL IN THE BENEFITS OF THEIR CHOICE AS OUTLINED IN APPENDIX A OF THE OFFER LETTER. THOSE HIRED FOR LESS THAN 12 MONTHS ARE CONSIDERED PART-TIME AND DO NOT QUALIFY FOR BENEFITS NOR VACATION LEAVE, HOWEVER, THEY DO RECEIVE 4% VACATION PAY ON TOP OF THEIR SALARY IN LIEU OF.
- \* **EACH PDF HIRE IS A UNIQUE SITUATION.** OFFER LETTER TEMPLATES ARE PROVIDED BELOW. CHOOSE THE APPROPRIATE LETTER, REVISE IT ACCORDING TO YOUR PDF'S PARTICULARS. FINALLY, FOLLOW THE CORRESPONDING CHECKLIST FOR THE REQUIRED PAPERWORK SUBMISSION.

**OFFER LETTER:**

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This is a contract between the Supervisor, the PDF and McMaster University. The offer must first be approved by our Department Chair. The process is outlined below:

1. Modify the appropriate offer letter template, print it on your Department letterhead and include the Appendices as they are part of the contract.
  - i. University salaried for **12 months or more** (*qualifies for benefits/vacation*)
  - ii. University salaried for **less than 12 months** (*no benefits; 4% vacation pay in lieu of*)
  - iii. **Self-funded** (*paid from an external funding source*)
2. The completed offer letter must be signed *in the following order*:
  - i. the Faculty/Supervisor;
  - ii. the Department Chair (send the *original* signed offer letter, a copy of the candidate's CV and PhD certificate to Jane Goad ([goadj@mcmaster.ca](mailto:goadj@mcmaster.ca)))
  - iii. the PDF's acceptance signature of the terms of the contract.
3. Use the following checklists as a guide to compile the final paperwork.  
**Note:** Internal forms are found on: <http://www.workingatmcmaster.ca/hris/forms/>
4. Send the complete package to Jane Goad ([goadj@mcmaster.ca](mailto:goadj@mcmaster.ca)).

CHECKLIST: **FELLOWSHIPS 12 MONTHS OR MORE**

- Original signed offer letter plus 2 copies
- Candidate's CV - 2 copies
- PhD certificate - 2 copies
- Original Recruit & Position form plus 1 copy
- Original Contact & Deposit form plus 1 copy of page 1 only
- Original Taxation forms (*no copies*)
- If applicable:* Employment Authorization/Work Visa - 2 copies

CHECKLIST: **FELLOWSHIPS TRANSFERRING FROM ANOTHER DEPARTMENT**

- Original signed offer letter plus 2 copies
- Candidate's CV - 2 copies
- PhD certificate - 2 copies
- Original Assignment Change Form plus 1 copy
- If applicable:* Employment Authorization/Work Visa - 2 copies

CHECKLIST: **FELLOWSHIPS LESS THAN 12 MONTHS**

- Original signed offer letter plus 2 copies
- Candidate's CV - 2 copies
- PhD certificate - 2 copies
- Original Recruit & Position form plus 1 copy
- Original Contact & Deposit form plus 1 copy of page 1 only
- Original Taxation forms (*no copies*)
- If applicable:* Employment Authorization/Work Visa - 2 copies

CHECKLIST: **SELF-FUNDED FELLOWSHIPS**

- Original signed offer letter plus 2 copies
- Candidate's CV - 2 copies
- PhD certificate - 2 copies
- Original Assignment Change Form plus 1 copy
- Proof of external funding - 2 copies
- Proof of external health coverage - 2 copies
- If applicable:* Employment Authorization/Work Visa - 2 copies

CHECKLIST: **EXTERNALLY FUNDED THROUGH MCMASTER PAYROLL**

- Original signed offer letter plus 2 copies
- Candidate's CV - 2 copies
- PhD certificate - 2 copies
- Proof of external funding - 2 copies
- Proof of health coverage - 2 copies
- Original Recruit & Position form plus 1 copy
- Original Contact & Deposit form plus 1 copy of page 1 only
- Original Taxation forms (*no copies necessary*)
- If applicable:* Original HRS Checklist (to open funding account) plus 1 copy
- If applicable:* Employment Authorization/Work Visa - 2 copies

## STAGE 2: SIGN-IN PROCEDURES

### **PDF's SIGN-IN...**

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HSC HR issues photo ID badges on Tuesday mornings from 9:00 am to 12:00 noon. PDF's must obtain an ID badge by bringing their offer letter to HSC-2J1 during this time.

- As outlined in the offer letter, University-funded PDF's hired for 12 months or more, must have a sign-in appointment with Pathology's FHS HR Consultant, Marcia MacAulay; HSC-2J5; ext. 22190; [macaula@mcmaster.ca](mailto:macaula@mcmaster.ca). It is recommended that the office of the Supervisor arrange this appointment once the final paperwork has been submitted. Also as outlined in the offer letter, the PDF must bring their credentials to this meeting. Applicable benefits will be registered for at this time.
- For eligible PDF's detailed benefits information, please visit: <http://www.workingatmcmaster.ca/med/document/ewlss-pdf-booklet-2005-1-40.pdf>
- PDF's hired for less than 12 months are considered temporary/casual employees and are entitled to 4% vacation in lieu of. They do not require a sign-in appointment, but must go to FHS HR on a Tuesday morning, with a copy of their offer letter, for a temporary ID badge.
- Self-funded PDF's do not require a sign-in appointment, but for security reasons, must also go to FHS HR on a Tuesday morning, with a copy of their off letter, to obtain an appropriate ID badge.

**IMPORTANT NOTE: DEPARTMENT PDF POLICY DOES NOT PROVIDE MOVING AND/OR RELOCATION EXPENSES. THE RESPONSIBILITY IS AT THE DISCRETION OF THE SPONSORING FACULTY MEMBER.**

## **FOREIGN OR OUT-OF-PROVINCE PDF'S ARE REQUIRED TO APPLY FOR...**

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### **Employment Authorization (EA):**

- The original offer letter will be required for this process.
- It is the responsibility of the PDF to ensure that their EA is up-to-date if their contract is extended and a copy must be submitted to Jane Goad ([goadj@mcmaster.ca](mailto:goadj@mcmaster.ca)) asap.

### **Employment Insurance (EI) #:**

- Obtained from the Employment and Immigration Office located at:  
31 King Street East, Hamilton, phone: 905-572-2211  
<http://www.hrsdc.gc.ca/eng/employment/ei/index.shtml>

### **Ontario Health Insurance Plan (OHIP):**

- OHIP should be applied for upon arrival in Canada even if it is earlier than the employment start date.
- OHIP requires proof of Ontario residency, therefore, out-of-province PDF's must also apply for OHIP.
- OHIP Office: 119 King Street West, Hamilton, phone: 905-521-7100  
[http://www.health.gov.on.ca/english/public/program/ohip/ohip\\_mn.html](http://www.health.gov.on.ca/english/public/program/ohip/ohip_mn.html)

### **University Health Insurance Plan (UHIP):**

- UHIP is a program that provides health care insurance coverage comparable to that provided by the OHIP. UHIP covers the 3-month OHIP application waiting period and is a mandatory coverage to non-Canadian PDF's and their dependents until they qualify for OHIP. It must be applied for upon arrival to Canada even if they arrive prior to their start date.
- To arrange for UHIP coverage, upon arrival to Canada, the PDF's Supervisor's office, must contact our HSC HR in HSC-2J1 (as follows) for an appointment:  
(A - L) Lori Valeri ext. 22207 [valeril@mcmaster.ca](mailto:valeril@mcmaster.ca)  
(M - Z) Mary Kiriakopoulos ext. 27638 [kiriakop@mcmaster.ca](mailto:kiriakop@mcmaster.ca)
- If the PDF is arriving from another province, their existing medical coverage will cover the 3-month waiting period until OHIP coverage begins. UHIP coverage will be retroactive to the date they enter the country upon application.
- Each year, Sun Life requires an re-enrolment in the UHIP plan for September 1<sup>st</sup>.
- Details on the benefit coverage are provided on [www.uhip.ca](http://www.uhip.ca).
- For rates, visit [http://www.uhip.ca/uploads/en\\_PremiumTable.htm](http://www.uhip.ca/uploads/en_PremiumTable.htm).
- For more benefit info, visit: [http://fhs.mcmaster.ca/postdoctoral\\_resources/](http://fhs.mcmaster.ca/postdoctoral_resources/)

## **SELF-FUNDED OR NON-UNIVERSITY PAID PDF'S**

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### **McMaster Photo ID**

- When a PDF is not paid through the McMaster payroll system, they are still required to obtain a photo ID badge by bringing a copy of their signed offer letter.
- Photo ID's are taken every Tuesday morning from 9:00 a.m. to 12:00 noon in HSC-2J1.

### **Health Insurance**

- Non-Canadian PDF's can purchase the University's Health Insurance for the duration of their appointment.
- Note: Depending on the Visa and length of appointment, the PDF may also be eligible for OHIP coverage (HR representatives listed on page 6).

## **EXTERNALLY FUNDED PDF'S**

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If funding is from an outside funding source/company, the PDF must still obtain an ID badge by visiting FHS HR on Tuesdays from 9:00 to 12:00 noon. They must take along a copy of their offer letter for verification.

## STAGE 3: CHANGES AND/OR TERMINATIONS

### **CHANGES, EXTENSIONS, TERMINATIONS....**

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#### **Contract Extension Paperwork:**

- Original Assignment Change Form plus 1 copy.
- Original extension letter on Department letterhead, signed by the Supervisor and the PDF accepting the terms of the extension of his contract - plus 1 copy.

#### **Termination/End of Contract Paperwork:**

- Original Assignment Change Form with the Termination section completed and signed by the Supervisor plus 1 copy.
- A copy of the resignation notification if applicable.
- Please ensure that this paperwork is submitted well in advance of the payroll deadline to avoid salary payments past the termination date.

*If the termination date is prior to the contract end date, and not initiated by the PDF, please see Appendix C* attached to the offer letter for important specific instructions.

#### **Postdoctoral Certificates Issued at end of term:**

- To qualify for a PDF Certificate, the PDF must have been engaged in post-doctoral studies for at least 1 year.
- Prior to the Fellowship contract end date, the PDF must complete an **Information Data Sheet** and send it to Jane Goad ([goadj@mcmaster.ca](mailto:goadj@mcmaster.ca))

### **MATERNITY LEAVE OF ABSENCE...**

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- A Leave of Absence form must be completed and signed by the PDF, Supervisor and Department. Please submit an original form plus 1 copy to Jane. This form sets in motion with HR and Payroll to mail the PDF the necessary paperwork for Employment Insurance.
- The PDF will receive EI for 17 weeks from the date of delivery. There is no “top up” from the University.
- To reactivate the PDF’s payroll, please advise Jane with the expected return-to-work date, especially if it is different than what was originally on the form. This must be confirmed in advance so that Jane can notify Payroll.