



FACULTY OF HEALTH

Post-Doctoral Fellowship **SCHOLAR** Appointment Checklist

by Dr. Karlee L. Bamford, Version 1.0 [09.05.2023]

A post-doctoral fellow (PDF) scholar is a PDF whose salary comes from a fellowship that they applied for and secured based on their own merit and/or research potential, and not that of their proposed Dalhousie supervisor. The PDF scholar may be paid through one of several routes, including via: a) FGS, b) a Dalhousie research account created to hold the fellowship, or c) direct payment from the funding agency to a personal bank account. PDF scholars include, for example, Banting, Killam, NSERC/SSHRC/CIHR, Donald Hill Family, and Mitacs Elevate fellows. *Note that Mitacs Accelerate PDFs are considered employees, not scholars.*

Letter of Offer (1 attachment):

- Prepare a letter (Dalhousie logo is required) using the standard template for an appointment for a Post-Doctoral SCHOLAR Fellowship found on the [Dal HR Post-Doctoral Fellows SharePoint site](#).
- Send the draft letter to the Faculty of Health's Director, Research for signature from the Dean.

Payroll (1 attachment):

- Complete a Post-Doctoral Payroll Profile form found on the [Dal HR Post-Doctoral Fellows SharePoint site](#) (a research account is *only* needed on the form in cases where the fellowship is being held in an account assigned to the supervisor for administration, see submission method B below).
- Principal Investigator/Supervisor signs on the designated line.

Funding (1 or 2 attachments):

- Obtain documentation confirming the fellowship that the post-doctoral candidate has secured (e.g., a letter of award/offer, a notice of award/decision etc.).
- *Where applicable:* Obtain the release of funds, first instalment, or award acceptance form from the funding agency for authorisation by Dalhousie (*note: this applies for submission methods A and B below*).

CV (1 attachment):

- Obtain a copy of the Post-Doctoral Fellow's up to date CV. The CV **must** clearly state the year in which the PhD was awarded. (*The post-doctoral fellowship cannot begin until this proof has been provided to HR.*) The PhD has to have been awarded in the last 6 years, or an MD awarded in the last 10 years.

□ **Submit the employment package:**

- A) For Banting, Killam, NSERC, SSHRC, Donald Hill Family and all other FGS-administered post-doctoral fellowships:
- Ensure the employment package containing the above **5** attachments and is submitted to the Faculty of Graduate Studies' Scholarship Liaison Officer (fgs.slo@dal.ca) for processing. This office will provide a signature to the fund release forms from the funding agency AND will submit the HR paperwork on to Academic Staff Relations on behalf of the supervisor, Unit, and post-doctoral candidate.

OR

- B) For all research account-held post-doctoral fellowships, including CIHR and Mitacs Elevate:
- Ensure that the proof of funding and release of funds documentation is forwarded to the ORS Post-Award Unit for signature and processing as soon as possible. This will initiate account opening for the fellowship under the supervisor's authority.
 - Complete the payroll form with the research account number, once available.
 - Ensure that the complete employment package containing the above **5** attachments (signed and with a research account number included) is submitted to Academic Staff Relations in HR (academic.staff.relations@dal.ca) before the payroll deadline of the month in which the post-doctoral fellowship payments are to begin. *Earlier is always better, where possible.*

OR

- C) For all other post-doctoral fellowships, namely those paid directly to the post-doctoral fellow's bank account without funds coming to Dalhousie:
- Complete the payroll form with the personal information of the post-doctoral fellow (*no research account number is required*).
 - Ensure that the complete employment package containing the above **4** components (*release of funds documentation is usually not required*) is submitted to Academic Staff Relations in HR (academic.staff.relations@dal.ca).

Changes to an existing Post-Doctoral Fellow Scholar: If the fellowship is terminating early or there is to be a leave of absence:

- A) For Banting, Killam, NSERC, SSHRC, and Donald Hill Family post-doctoral fellow scholars:
- Contact the Faculty of Graduate Studies' Scholarship Liaison Officer (fgs.slo@dal.ca) and provide details of the change in fellowship. The funding agency will likely have return-of-funds or leave-of-absence paperwork that needs to be completed and which the SLO can help facilitate.

- In cases where the PDF scholar has already been paid funds that need to be return to the agency, it is the responsibility of the PDF to manage the return of those funds.

OR

B) For all research account-held post-doctoral fellowships, including CIHR and Mitacs Elevate:

- Ensure that the leave-of-absence or termination-of-award documentation is forwarded to the ORS Post-Award Unit for signature and processing as soon as possible, if needed by the funding agency.
- Send a completed PDF Change Form (with the **PI's e-signature**, available on the [Dal HR Post-Doctoral Fellows SharePoint site](#)) to Academic Staff Relations in HR (academic.staff.relations@dal.ca).
- In cases where the PDF scholar has already been paid funds that need to be return to the agency, it is the responsibility of the PDF to manage the return of those funds.

OR

C) For all other post-doctoral fellow scholars:

- Send a completed PDF Change Form (with the **PI's original signature**, available on the [Dal HR Post-Doctoral Fellows SharePoint site](#)) to Academic Staff Relations in HR (academic.staff.relations@dal.ca).
- In cases where the PDF scholar has already been paid funds that need to be return to the agency, it is the responsibility of the PDF to manage the return of those funds.