

Setting Up a Postdoc at York

A SUMMARY OF REQUIREMENTS FOR DIFFERENT POSTDOC CATEGORIES

1. Is it a PDV or a PDF?

Postdoctoral researchers at York are categorized as either Postdoctoral Fellows (PDFs) or Postdoctoral Visitors (PDVs). The categories depend on where the fellowship was created or originated. If the fellowship is offered by any body external to York, the incumbent is categorized as a PDF. If the fellowship is created by a researcher or unit at York University and paid for through university funds of any type, the incumbent is a PDV (see [Definitions](#) for additional details.)

Key Question – What is the source of funding?

- Need to ask the question any time there is a possible change.
- All funding must be from university funds (most commonly faculty member grants) to be PDV.
- If any external fellowship funding is awarded to the postdoc it is a PDF position even when the funding is administered through York. Note that the funding will be held in a cost centre in the name of the supervisor.
- For a PDF, any additional funding provided by the supervisor using grant funds will be considered a “top up” and treated as employment income (i.e. mandatory statutory benefits will be applied).

2. What happens when a postdoc changes categories (e.g. PDV to PDF)?

When there is a change to the funding of a postdoc position a change in the postdoc category may result. For example, if a PDV applies for and receives external fellowship funding. The first step in a change of category is issuing a new offer letter to match the category.

Some additional considerations:

- healthcare benefits: the healthcare spending account is mandatory for PDVs, an optional healthcare benefits package is available for PDFs whose funding is administered through York. Additional details on benefits can be found in the [Budgeting, Hiring & Supervision](#) section.
- teaching: PDVs can be assigned up to 1.0 FCE per academic year, PDFs are able to teach by applying for CUPE postings or through CUPE exemptions. The [Teaching Opportunities for Postdoctoral Fellows \(PDFs\) memo](#) contains additional details.
- immigration: The same code is used by Immigration, Refugees and Citizenship Canada (IRCC) for PDVs and PDFs. If there are questions related to an international postdoc

with an employer-specific work permit changing categories at York, please contact [Immigration & Relocation](#) for guidance.

3. What are guidelines and requirements for PDVs?

Institutional requirements for PDVs are covered under the YUFA Collective Agreement (available on the [Faculty Relations website](#)) and the [Senate Policy on Postdoctoral Researchers at York University](#).

Funder requirements also apply to PDV positions. For example, the [Tri-Agency Guide on Financial Administration](#) states, “The Agencies view postdoctoral studies as a short-term period of training to prepare individuals for research careers. To this end, the Agencies aim to promote the mobility and career progression of postdoctoral fellows by encouraging reasonable compensation for time spent working on grant recipients’ funded research/activities. *The Agencies defer to the administering institutions’ policies concerning the length of tenure of postdoctoral studies.* If no time limits are established, the Agencies strongly encourage administering institutions to develop a policy.” [Emphasis added]. Both the collective agreement and senate policy limit the total amount of time spent in a postdoc position at York to a maximum of 4 years.

The administration of PDV contracts is through the supervisor’s Dean’s Office and includes a PDV offer letter and ETF. Please see [Hiring and Internal Procedures](#) for additional details, including information on budgeting for PDV positions.

The healthcare spending account is mandatory for PDVs. The benefit booklet explaining the coverage can be found on the [Pension & Benefits website](#).

PDVs can be assigned up to 1.0 FCE teaching per academic year.

International PDVs require a work permit. For postdocs requiring an employer-specific work permit, the supervisor’s Dean’s Office will prepare a letter for immigration purposes and submit an Offer of Employment to A Foreign National Exempt from a Labour Market Impact Assessment form in IRCC’s Employer Portal. The supervisor is responsible for the \$230 compliance fee. For further information on immigration requirements please visit the [Immigration & Relocation website](#).

An [Onboarding Checklist](#) is available for PDVs to assist with setup.

4. What are the guidelines and requirements for PDFs?

Institutional requirements for PDFs are covered by the [Senate Policy on Postdoctoral Researchers at York University](#).

All PDFs should have a letter outlining the position and including an IP agreement. Additional information is available on the [Hiring and Internal Procedures](#) page and a template letter is

available in the PDF Letter Templates section of [Budgeting, Hiring & Supervision](#). When the funding for a PDF position is administered through York an PDF ETF is also required.

Institutional policy is to treat funds administered by York as employment/T4 income unless prohibited by the funder and the funding will need to cover the costs of employer-paid statutory benefits (CPP, EI, WISB, etc.). This must be taken into account in the letter and ETF.

Under Tri-Agency guidelines, Tri-Agency postdoctoral fellowship awards (e.g. CIHR PDF, NSERC PDF, SSHRC PDF) should be paid as T4A income. See [Budgeting, Hiring & Supervision](#) for additional information, including a specialized template letter and Payroll instructions.

An optional healthcare benefit package is available for PDFs whose funding is administered through York at the discretion of the supervisor or host unit. The benefit booklet explaining the coverage can be found on the [Pension & Benefits website](#). Actual charges are made when charged to a research cost centre. Costs can be found in the [Research Costs Table](#).

PDFs are able to teach through applying for CUPE postings or CUPE exemptions only. In an effort to enhance offer letters to superior candidates and provide further opportunities for career development, anchor Faculties may build teaching opportunities into a PDF appointment. Please the memo [Teaching Opportunities for Postdoctoral Fellows \(PDFs\)](#) for more information on the process and requirements.

International PDFs require a work permit whether or not the funding is administered through York. For postdocs requiring an employer-specific work permit, the supervisor's Dean's Office will prepare a letter for immigration purposes and submit an Offer of Employment to A Foreign National Exempt from a Labour Market Impact Assessment form in IRCC's Employer Portal. The supervisor is responsible for the \$230 compliance fee. For further information on immigration requirements please visit the [Immigration & Relocation website](#).

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5. Questions?

Please visit our [Faculty Members & Administrators](#) page or contact Kim McIntyre, Postdoctoral Services & Professional Skills Coordinator, at kimmcint@yorku.ca.