

Administrative Checklist Prior to Arrival of Postdoctoral Fellow

Before Postdoc Arrives

Department/Faculty/Unit Preparation	Yes	No/Not Required
• Confirm eligibility (no more than 5 years after completion of PhD)	<input type="checkbox"/>	<input type="checkbox"/>
• Transfer of any grants if required/stipend considerations	<input type="checkbox"/>	<input type="checkbox"/>
• Complete FVCA form for foreign nationals	<input type="checkbox"/>	<input type="checkbox"/>
• Issue an Appointment Letter	<input type="checkbox"/>	<input type="checkbox"/>
• Space allocation considerations	<input type="checkbox"/>	<input type="checkbox"/>

Postdoc Preparation

• International Postdocs need their Work Permit . Depending on Citizenship, a Temporary Resident Visa also may be required before arriving in Canada.	<input type="checkbox"/>	<input type="checkbox"/>
• Obtain Travel Insurance and discuss any reimbursements	<input type="checkbox"/>	<input type="checkbox"/>
• Read through the Postdoctoral Fellows Office FAQ page	<input type="checkbox"/>	<input type="checkbox"/>
• Obtain housing	<input type="checkbox"/>	<input type="checkbox"/>
• If arriving with family, apply for daycare/schools as necessary	<input type="checkbox"/>	<input type="checkbox"/>
• If required, applied for a parking permit	<input type="checkbox"/>	<input type="checkbox"/>
• Learn about the Postdoctoral Fellow Association	<input type="checkbox"/>	<input type="checkbox"/>

Once Postdoc Arrives

Once Postdoc Arrives - Need to do outside of U of Alberta	Yes	No/Not Required
• International Postdocs need to apply for Social Insurance Number	<input type="checkbox"/>	<input type="checkbox"/>
• Apply for bank account	<input type="checkbox"/>	<input type="checkbox"/>
• Apply for Health Care if staying 12 months or longer	<input type="checkbox"/>	<input type="checkbox"/>

Once Postdoc Arrives – Within Sponsoring Unit (Department/Faculty/Institute)

• Postdoc is introduced to the Administrative staff of hosting unit	<input type="checkbox"/>	<input type="checkbox"/>
• Unit creates a UAlberta ID# and Campus Computing ID (CCID)	<input type="checkbox"/>	<input type="checkbox"/>
• Provide Social Insurance to Department for Payroll	<input type="checkbox"/>	<input type="checkbox"/>
• Provide information for Postdoctoral Fellows Pay/Benefits Action Form	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Direct Deposit to receive stipend if finances received through University of Alberta	<input type="checkbox"/>	<input type="checkbox"/>
• International Postdocs paid by country outside of Canada need to complete a Determination of Residency Status for taxation purposes	<input type="checkbox"/>	<input type="checkbox"/>
• Complete Personal Tax Credit Forms (TD1 & TD1AB)	<input type="checkbox"/>	<input type="checkbox"/>
• Completed PDF registration form	<input type="checkbox"/>	<input type="checkbox"/>

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Once Postdoc Arrives

Once Postdoc Arrives – Within Sponsoring Unit (Department/Faculty/Institute)

• Bring CV, copy of PhD Certificate and original signed Appointment letter	<input type="checkbox"/>	<input type="checkbox"/>
• Provide copy of Work Permit (International Postdocs only)	<input type="checkbox"/>	<input type="checkbox"/>
• Complete the University of Alberta Health Insurance Plan if staying less than 12 months (contact HR Benefits person designated for your unit)	<input type="checkbox"/>	<input type="checkbox"/>
• Added to faculty/department/unit mailing lists (will receive Employee Digest automatically)	<input type="checkbox"/>	<input type="checkbox"/>
• Update website	<input type="checkbox"/>	<input type="checkbox"/>
• Access to building/lab/facilities - swipe or key	<input type="checkbox"/>	<input type="checkbox"/>
• Order business cards if applicable	<input type="checkbox"/>	<input type="checkbox"/>
• Network mapped for computer access if applicable	<input type="checkbox"/>	<input type="checkbox"/>

Last stop - Once Postdoc Arrives - Postdoctoral Fellows Office

- 1 Department provides registration information to PDF Office. PDF Office notifies department/postdoc of any missing documents.
- 2 PDF Office verifies eligibility, benefits, and forwards information to Human Resources.
- 3 Campus welcome and orientation package forwarded to postdoc by campus mail
- 4 Postdoc will receive notification from Postdoctoral Fellows Office when they can go to **ONEcard Office in HUB Mall** for their University of Alberta ID card.
- 5 PDF Office provides reminder for postdoc to make last changes to supplemental health care benefits.

NOTE: Human Resources Services (HRS) can take up to two weeks to process requests and the earliest payroll deposit is typically two weeks later after processing. Therefore payroll will take **at least a month** before a deposit is made into the PDFs bank account. Deductions taken off the pay include CPP, EI, and WCB. Full library and other university services are suspended until HR has completed processing.