

Where Can I Get More Information?

For additional information...

Contact...

Concerning ...

Postgraduate Scholarships (PGS)

Postdoctoral Fellowships (PDF)

1967 Science and Engineering Scholarships (SES)

- In Engineering, Computing and Mathematical Sciences, Physics and Chemistry (613) 996-3769, 992-2246
- In Earth Sciences and Ecology, Cellular and Molecular Biology, Life Sciences and Psychology (613) 996-3762, 992-9169

NATO Science Fellowships

(613) 996-0264

Payments

(613) 995-5799

Facsimile

(613) 996-2589

E-mail

- For acceptance or refusal of awards accept@nserc.ca
- For policy questions schol@nserc.ca
- For application forms and guides distribution@nserc.ca
- For questions relating to payments, financial and/or taxation-related issues scholfin@nserc.ca

Mailing Address

NSERC
Scholarships and Fellowships Division
350 Albert Street
Ottawa, Ontario K1A 1H5
Canada

Concerning ...

the supplements to NSERC postgraduate scholarships, contact the sponsoring organization.

Communicating with NSERC

When communicating with NSERC, indicate your application number and PIN, and specify the type of award you hold.

You are responsible for ensuring that documentation sent to NSERC is complete. NSERC requires original signatures on all documents. Faxes and photocopies will not be accepted.

Award Holder's Guide

for

**Postgraduate Scholarship (PGS) Holders at
Foreign Institutions**

**Julie Payette – NSERC Research
Scholarship Holders at Foreign Institutions**

**1967 Science and Engineering Scholarship
(SES) Holders**

Postdoctoral Fellowship (PDF) Holders

NATO Science Fellowship (NATO) Holders

Attention:

Postgraduate Scholarship and Julie Payette – NSERC Research Scholarship holders
at Canadian universities must use the guide entitled
NSERC Award Holder's Guide 2001 –
for Postgraduate Scholarship (PGS) Holders at Canadian Universities.

Published by the Natural Sciences and Engineering Research Council of Canada

More copies of this document and/or forms can be obtained from:

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www.nserc.ca

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NOTE: These forms are also available on NSERC's Web site, www.nserc.ca

Introduction

The information in this guide is valid for the duration of your award.* It supersedes previous statements on Fellowships/Scholarships regulations by NSERC (the Natural Sciences and Engineering Research Council). It is intended for use by:

- **PGS A and PGS B holders registered at foreign institutions (PGS)**
- **Julie Payette – NSERC Research Scholarship holders registered at foreign institutions**
- **All 1967 Science and Engineering Scholarship** holders (SES)**
- **All Postdoctoral Fellowship holders (PDF)**
- **All NATO Science Fellowship holders (NATO Fellowship)**

Please read this guide carefully on receipt of your Notice of Award. It contains important information regarding the payment and administration of your award.

Note:

All personal information collected by NSERC is subject to the *Access to Information Act* and the *Privacy Act*, as described in Appendix 2 of the *NSERC Scholarships and Fellowships Guide*.

In this guide

- “your university” refers to the university at which you are registered as a full-time student during tenure of your award.
- the date of degree completion is considered to be the date on which all requirements for your degree have been met, including successful defence and submission of the corrected copy of your thesis (in accordance with your university’s regulations).

* NSERC may, without notice, change award regulations or the terms and conditions of the awards. Any major changes will be announced immediately to award holders and/or on NSERC’s Web site, www.nserc.ca.

** Although new awards are no longer offered under this program, the regulations described in this guide are still in effect for previously offered awards.

1. General Regulations

To hold an award, you must:

- abide by the regulations governing awards, as described in this guide, in the Notice of Award and in the program description found in the NSERC *Scholarships and Fellowships Guide* or in the program leaflet for the NATO Science Fellowships program;
- abide by regulations regarding animal care, ethical considerations in the use of human subjects in research, and biohazards (see the NSERC *Scholarships and Fellowships Guide*, and the *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans* for more information);
- comply with NSERC's integrity policy (see the NSERC *Scholarships and Fellowships Guide* for more information); and
- acknowledge, wherever possible, NSERC's funding assistance for the research.

In addition,

- **PGS/SES** holders must:
 - have been unconditionally accepted into a recognized graduate studies degree program in a field supported by NSERC;
 - be registered full-time and progressing satisfactorily in a graduate studies program at an eligible university.
- **PDF/NATO Fellowship** holders must:
 - be engaged in full-time research at an eligible institution.

Awards may be cancelled without notice if the conditions under which they are granted are violated.

2. Value and Duration of Award

- The value and duration of your award are detailed in your Notice of Award.
- **PGS/SES** holders: The value and duration of your award may be adjusted to take into account a change in your registration status, e.g., early completion of your degree, termination of your graduate studies program, etc.
- **PGS A** holders: PGS A holders should note that their scholarship support will not extend beyond the 28th month of their master's program. If you have completed more than four months' full-time equivalent in a master's program **at the time you take up your award**, the normal 24-month duration will be decreased by the number of months in excess of 4 that have been completed at that time.

Request for the balance of the PGS A support if the duration of your award is less than the maximum of 24 months: You can request the balance of the PGS A support if you transfer to a doctoral program during the term of your PGS A, or if you complete your master's degree prior to the termination of your PGS A and continue immediately into a doctoral degree program.

Request for a stipend increase to the PGS B level: PGS A holders who transfer from a master's into a doctoral program, who complete their master's degree in less than 24 months and proceed into a doctoral program, or who enrol directly in a doctoral program following completion of their bachelor's degree are eligible to have their stipend increased to the PGS B level for the balance of the award. You must have completed a minimum of 12 months of postgraduate studies and have been admitted **unconditionally** into the doctoral program. This increase in stipend is not automatic; you must request it. Students who receive the increase must still apply for a PGS B if they wish to receive continued support beyond the term of the PGS A.

To request the balance of the PGS A stipend or the increased stipend, complete Form 3 – Request for Increased Stipend/Balance of Award – and submit it to NSERC.

3. Acceptance and Refusal of Award (New Award Holders Only)

- You must notify NSERC **within six weeks** of the date on the Notice of Award of your decision to accept or refuse the award.
 - To accept the award, submit an e-mail (accept@nserc.ca) **or** fax (613-996-2589) to NSERC containing the following information:
 - 1) the expected start date of your award; and
 - 2) the university and department of tenure (if known).
 - To refuse the award, submit an e-mail **or** fax to NSERC specifying the reason for refusal, e.g., employment, acceptance of another award.
- **NSERC will cancel any award not accepted by the above deadline.**
- Notification by telephone is **not** acceptable.
- NSERC must receive the above-mentioned notification even if you plan to request a deferment of your award (see Section 5 – Deferment of Award).
- To initiate payment of your award, see Section 6 – Payment of Award.

4. Start Date

- If you have already begun the program of studies for which funding was awarded, you must take up your award on the first day of the May or September academic term following the announcement of the results.
- If you have not yet begun the program of studies for which funding was awarded, you must take up your award on the first day of the May, September or January academic term following the announcement of the results.
- If NSERC does not receive your duly completed Form 1 (Request for First Instalment) by

November 1 of the year following announcement of the results, your award may be cancelled.

- If you anticipate that you will not be able to complete your degree requirements by December 31, you must decline the award. However, you may apply again in the following competition as long as you remain eligible.
- **PDF** holders: You can take up your award at any time between April 1 of the year in which you are awarded the fellowship and January 15 of the following year.
- **NATO Fellowship** holders: Awards must be taken up by July 1.

5. Deferment of Award

- Before commencing your award, you may request permission to defer it for up to three years, but only for reasons of maternity, child rearing, illness, or health-related family responsibilities. You may not defer your award in order to take up another award or to accept or hold employment.
- You must complete Form 5 – Request for Deferment, Interruption or Reinstatement of Award – and send it to NSERC for approval as soon as possible, but no later than October 1 of the year of the original award. Supporting documentation (e.g., birth, adoption or medical certificate) confirming the reason for deferment must also be included with the request.
- **PGS/SES** holders: If you are currently registered in the program for which funding was awarded, you must obtain an authorized leave of absence from your university. NSERC will not defer your award otherwise.
- Even though you intend to defer your award, you must submit confirmation to NSERC that you have completed – by December 31 of the year of the original award – all requirements of your previous degree (if not already submitted with your application), or your award will be cancelled.
- **NATO Fellowship** holders: You are not permitted to defer your award.

6. Payment of Award

- To activate your award, complete Form 1 – Request for First Instalment – and submit it to NSERC’s Scholarships and Fellowships Division between four and six weeks prior to the date on which you intend to take up your award. No payment will be made until NSERC has received the required documentation.
- **PGS/SES** holders: Before you may take up your award, you must provide confirmation, from the Dean of Graduate Studies of the university at which you will hold the award, that the graduate school has admitted you unconditionally with full-time graduate student status to engage in a program of study and research in a discipline acceptable to NSERC. (See Form 1 – Request for First Instalment.)
- **PDF/NATO** Fellowship holders: Before you may take up your award, you must provide confirmation that you have successfully completed all requirements for your doctoral degree, if you did not already provide this confirmation as part of your application. (See Form 1 – Request for First Instalment.)
- If you wish to transfer to a different university/location of research, see Section 10 – Change of University/Location of Research.

6.1 Subsequent Instalments

- Payments are made in Canadian funds at six-month intervals for awards that were taken up in or after May 1999. Awards that were taken up before May 1999 will continue to be paid at four-month intervals.
- Payment requests should be submitted to NSERC between four and six weeks before the due date.
- To initiate subsequent instalments, submit the duly completed and signed Form 2 – Request for Subsequent Instalments – to the Finance Division, NSERC, at appropriate intervals.

- **For awards that were taken up in or after May 1999** – to request your 3rd instalment, submit the duly completed and signed Form 7 – Annual Progress Report/Request for Subsequent Instalment – to the Scholarships and Fellowships Division, NSERC, at the appropriate time. See Section 13 also.

OR

- **For awards that were taken up before May 1999** – to request your 4th instalment, submit the duly completed and signed Form 7 – Annual Progress Report/Request for Subsequent Instalment – to the Scholarships and Fellowships Division, NSERC, at the appropriate time. See Section 13 also.
- NSERC may adjust the value of your award to take account of a change in your period of tenure.
- NSERC may cancel your award without further notice if the payment request is overdue by four months or more.
- **NATO Fellowship** holders: Payment of your award will be made in Canadian funds at six-month intervals.

6.2 Mailing Address for Cheques

- Instalment cheques will be issued in your name and mailed to the address indicated on Form 1 – Request for First Instalment.
- If you change your address during tenure of the award, you should indicate your revised address on Form 2 – Request for Subsequent Instalments – or on Form 7 – Annual Progress Report/Request for Subsequent Instalment.
- **NATO Fellowship** holders: Instalment cheques will be issued in your name and mailed to the university department where you hold your award.

7. Interruption of Award

- You must obtain approval from NSERC prior to any interruption of your award.
- For approved interruptions, NSERC will suspend payment of your award for the duration of the interruption and will resume payment when all the conditions of your award are met (generally, on your return to full-time studies/research).
- You may not interrupt your award in order to take up another award.
- To request an interruption, you must fill out Form 5 – Request for Deferment, Interruption or Reinstatement of Award – and submit it to NSERC, along with supporting documentation such as birth or medical certificates.
- **PGS/SES** holders: Approval of all leaves is conditional on your university's permitting such leaves.
- **PDF/NATO** Fellowship holders: Approval of all leaves is conditional on your supervisor's supporting such leaves.

7.1 Unpaid Leave for Reasons of Maternity, Child-Rearing, Illness, or Health-Related Family Responsibilities

- You are eligible for a leave of absence of up to three years, in accordance with your university's policies, for reasons of maternity, child-rearing, illness, or health-related family responsibilities only, **provided your university permits such leaves**.
- To request this leave of absence, you must submit in advance the duly completed Form 5 – Request for Deferment, Interruption or Reinstatement of Award – to NSERC, including the support from your supervisor (PDF) or the Dean of Graduate Studies (PGS/SES). You must also provide supporting documentation, such as birth or medical certificates, justifying and substantiating the reason for interrupting your award.

- **NATO Fellowship** holders: You may be allowed an interruption of your award for a short period of time (up to four months) for leave related to maternity, child rearing or health-related family responsibilities. A justification, including the support of your supervisor, must be provided in advance to NSERC.

7.2 Paid Parental Leave

- If you will be interrupting your studies/research/award within six months of a child's birth or adoption in order to be the primary caregiver for the child, you may request a paid parental leave supplement at your current stipend level for up to four months.
- You may not receive this supplement while your award is being deferred.
- The maximum period of paid leave is four months, even in cases of multiple births or adoption of more than one child at the same time.
- If both parents are supported by the council, each parent may take a portion of the leave, for a combined maximum duration of four months.
- To request the paid parental leave, you must submit the duly completed Form 5 – Request for Deferment, Interruption or Reinstatement of Award – to NSERC, along with a letter in which you confirm that:
 - during the parental leave you will not be engaged in your research activities or employed;
 - you will be the primary caregiver of your child during the parental leave;
 - you are not eligible for and will not receive employment insurance or other maternity/parental benefits from other sources; and
 - the other parent has not received and will not receive employment insurance or other maternity/parental benefits before or during the period that the parental benefit is paid by the council.

- Please request the paid parental leave at least four months before the proposed start date of the leave.
 - As soon as possible after the birth/adoption of the child, you must submit a copy of the child's birth/adoption certificate to NSERC.
- **NATO Fellowship** holders: You are not eligible for this leave/benefit.

7.3 Leave for Relevant Work Experience (For PGS/SES holders only)

- You may interrupt your award to obtain relevant work experience. The interruption will not reduce the total amount of support available to you.
 - You are not entitled to receive your award payments during such interruptions.
- **PGS A/SES A** holders: You are permitted one four-month interruption for this type of leave during the term of the award.
- **PGS B/SES B** holders: You are permitted two four-month interruptions for this type of leave during the term of the award.
- No two periods of leave for work experience can be consecutive.
 - To request an interruption, you must submit the duly completed Form 5 – Request for Deferment, Interruption or Reinstatement of Award – to NSERC.
 - For the purpose of determining eligibility for future NSERC scholarships, these interruptions will not count when the number of months spent in graduate studies is being calculated, regardless of your registration status.
 - To request an interruption of your award for this leave, you must notify NSERC four weeks in advance in writing, and your request must be supported by your supervisor and the

Dean of Graduate Studies (see Part II of Form 5 – Request for Deferment, Interruption or Reinstatement of Award).

7.4 Vacation Leave

- Your university's regulations will apply with respect to vacation leave.

8. Reinstatement of Award

- To reinstate a deferred or interrupted award, you must notify NSERC in writing at least eight weeks before resuming your studies or research, confirming the exact date you intend to reinstate your award (see Part III of Form 5 – Request for Deferment, Interruption or Reinstatement of Award). Before your instalment payment can be issued, you must also provide confirmation from your university (Faculty of Graduate Studies for PGS/SES holders or supervisor for PDF holders) that you have resumed the studies or research for which the funds were awarded. See also Section 6 – Payment of Award.
- Awards will be governed by the regulations applicable at the time of reinstatement.

9. Change of Research Project

- If your program of studies or research is in a discipline that falls under the mandate of more than one federal granting agency (e.g., psychology, management studies, geography, physical education, optometry, or health sciences), you must obtain prior approval from NSERC to change your research project.

- To request approval for a change of research project, you must send an outline of the proposed research, including the proposed supervisor's name, to NSERC.
- If you modify your research project to the extent that the field of study is not under NSERC's mandate, you will no longer be eligible to hold the award and it will be cancelled.

10. Change of University/ Location of Research

- If you wish to change your university of tenure/research location, you must obtain prior approval from NSERC to confirm the eligibility of your proposed research and your eligibility to hold the award at the new institution. Such requests should be made as soon as possible, preferably eight weeks prior to your start or transfer date. See also Section 9 – Change of Research Project.

➤ PGS/SES holders:

1) To change your university **before taking up the award:**

Indicate the new university on Form 1 – Request for First Instalment. Part II of the form is to be completed by an authorized official at the new university.

- If the new university is outside Canada, you must submit a new justification for location of tenure and a letter from a Canadian authority in support of the change.

2) To change your university **after having taken up the award:**

You must send the following documentation to NSERC:

- the duly completed and signed Form 4 – Request to Change University/Location of Research – supported by the heads of the department of the original university and the proposed university,

- a letter justifying your reasons for the change, and
- a letter signed by the Dean of Graduate Studies at the proposed university confirming unconditional admission.

➤ **PGS A** holders: If you have completed your master's degree in less than two years and want to use the balance of your award to commence your doctoral program, you do not need to include a letter justifying the reasons for the change.

➤ **PDF** holders:

- To change your location of research **before taking up the award:**

You must complete Form 4 – Request to Change University/Location of Research – and send it to NSERC. Only the signature of the head of the proposed department is required on Part II of Form 4. An outline of the new research project may also be required.

- To change your university **after having taken up the award:**

You must send the following documentation to NSERC:

- the duly completed and signed Form 4 – Request to Change University/Location of Research – supported by the heads of the department of the original university and the proposed university,
- a letter justifying your reasons for the change,
- a brief outline of the research to be carried out at the proposed location.

If you received your doctoral degree from a foreign institution, you are not permitted to hold your PDF at a foreign institution.

➤ **NATO Fellowship** holders: You are not permitted to transfer to a different institution.

11. Travel Allowances (NATO Fellowship Holders Only)

- Travel allowances are paid for NATO fellows and their families (i.e., spouse and dependent children, if applicable).
- Travel allowances are normally paid in Canadian funds and are made at the discretion of NSERC. If another organization provides part or all of the cost of travel, NSERC will reduce its allowance accordingly.
- You are expected to travel by the most direct and/or economical route, and are encouraged to take advantage of reduced airfares when available.
- The travel allowance will not exceed the cost of economy airfare plus a flat allowance as a contribution toward the cost of ground transportation to and from the airport. The flat allowance is \$200 for the fellow, plus \$50 each for the spouse and/or children when they accompany the award holder to the location of tenure for a minimum of six months. Cancellation insurance premiums may be reimbursed, when justified.
- To request prepayment of their air travel costs, fellows should submit an official invoice from a recognized travel agency to the Finance Division, NSERC, at least eight weeks before travel. The invoice must include the address of the travel agency. Payment will be made directly to the agency if appropriate financial information is provided. The agency will not release the ticket(s) until payment is received.
- Fellows who pay their own travel costs may request reimbursement on arrival in Canada, by submitting the completed Form 6 – Application for a Travel Allowance – to the Finance Division, NSERC.
- No allowance is provided toward the cost of transporting excess baggage, air freight, or the removal and storage of household effects.

- If you have completed at least one full year of your fellowship, you may be entitled to a reimbursement of return travel costs to your country of citizenship or to another of the Partner countries. You will not receive a return allowance unless you return within two months after termination of the award.

12. Other Sources of Income (Employment and Other Awards)

- NSERC expects PGS/SES holders to devote the majority of their time to the timely completion of their degree program and PDF holders to engage in full-time research. NSERC limits the number of hours of employment per 12-month period to 450.
- You may not concurrently hold another award from NSERC or from another federal granting agency (CIHR or SSHRC). You may, however, accept awards from other sources, regardless of value, e.g., foreign sources, provincial awards, private organizations, your university, etc.
 - **PGS/SES holders:** Payment of the award during paid internships and co-op work terms is permitted, regardless of your registration status, provided that they are a requirement of your program of studies.
 - **PGS/SES holders:** You may not accept remuneration or supplements paid from other NSERC grants, whether paid as a scholarship or salary.
 - **PDF/NATO Fellowship holders:** You may accept supplements from NSERC grants. There is no limit on the value of such supplements and they are considered additional fellowship payments and not payments for duties performed.

13. Annual Progress Reports

- NSERC requires an annual progress report to be submitted on the anniversary date of your award. Please complete Form 7 – Annual Progress Report/ Request for Subsequent Instalment – in conjunction with your supervisor, and submit it to the Scholarships and Fellowships Division.
- This report will serve as your request for the relevant instalment.
- NSERC may cancel the award if your progress is judged unsatisfactory.
- **NATO Fellowship** holders: You and your supervisors must also submit a report to NSERC at the end of the fellowship. Details will be provided at the appropriate time.

14. Termination of Award

- If you terminate your full-time registration status or accept full-time employment before the end of the period covered by the award (except as permitted by regulations governing your award as outlined in Sections 7 and 12), you must inform NSERC in writing of the actual date of termination. (See Form 8 – Termination of Award.)
- If you accept full-time employment, regardless of whether you have completed your degree or not, your award will be terminated as of the effective date of your contract of employment. The value of the award will be prorated.
- NSERC will contact you to reclaim any overpayment of your award.
- If you have submitted your thesis, you are still eligible to receive your payments until the defence is successfully completed, provided you have not accepted full-time employment, or started another program of studies, and you are still registered full time in the graduate studies program for which funding was awarded.

15. Other Issues

- **Taxation:** Stipends and travel allowances received are taxable income. NSERC does not make any deductions at source; therefore, you are responsible for paying any necessary income tax. The date on the instalment cheque will determine the year in which you will be taxed for the instalment. You are not permitted to defer an instalment to the next taxation year. All inquiries related to tax regulations must be addressed to the Canada Customs and Revenue Agency, Taxation. For information on taxable income, please obtain the appropriate Interpretation Bulletin from your district taxation office.
- **Release of T4A Forms:** T4A forms for personal income tax purposes are normally mailed in February. (Award holders who pay provincial taxes in Quebec should note that the Quebec government will accept a photocopy of your federal T4A form with your Quebec income tax returns.)
- If you hold your award at an institution outside Canada, or if you anticipate leaving the university before February, you must inform NSERC, no later than December 31 of the taxation year, of the mailing address for your T4A form. (See Forms 1 and 2 – Request for First or Subsequent Instalments.)
- **Insurance:** NSERC is unable to assume liability for accidents, illness, or losses that may occur during the tenure of an award. You are responsible for ensuring that you have appropriate insurance.
- **Foreign Immigration and Taxation Regulations:** If you hold or intend to hold your award at an institution outside Canada, you must contact the appropriate agencies for immigration and taxation regulations. NSERC cannot advise award holders on such matters.
- **The Access to Information Act and the Privacy Act:** We encourage you to read the Acts as they pertain to application information (see the NSERC *Scholarships and Fellowships Guide*).

APPENDIX 1

International Considerations for NATO Fellows

NATO fellows must satisfy the immigration, health insurance and income tax requirements outlined below, before or during their stay in Canada, as appropriate.

1) Immigration

You should contact the Canadian Visa Office at the nearest Canadian Embassy, High Commission, or Consulate as soon as possible to initiate immigration procedures. Before coming to Canada, you must obtain an Employment Authorization that is valid for at least 12 months. You will need to provide the Canadian Visa Office with the following documents:

- a valid passport; and
- the NSERC offer of award and your letter of acceptance.

You may also require a visitor's visa and other immigration documentation for yourself and for accompanying family members. NSERC is not responsible for obtaining these documents. If you plan to travel outside Canada during the tenure of your award, you should apply for a multiple-entry visa.

Once in Canada, you must renew your Employment Authorization if the initial period covered was not the full two-year award period. You will require a Social Insurance Number (SIN) – NSERC cannot pay your second and subsequent instalments unless you have one. You can apply for a SIN at a local Human Resources Centre.

NSERC does not pay for medical examinations or any other documentation you may require to hold your award in Canada.

2) Health Insurance

Health insurance is under provincial jurisdiction, and rules and regulations vary across Canada.

NSERC requires that you have health insurance coverage during the tenure of your award. The host university can help you obtain coverage.

NSERC does not pay for health insurance premiums or for health care expenses.

3) Income Tax

Section 15 regarding taxation and T4A forms also applies to NATO fellows.

Your tax status as a foreigner will depend on the length of time you spend in Canada in any given calendar year, and on any agreement between Canada and your country of origin.

You should contact the Canada Customs and Revenue Agency to clarify your tax status in Canada and to obtain all the information required to file an income tax return:

International Tax Services
Canada Customs and Revenue Agency
2204 Walkley Road
Ottawa, Ontario K1A 1A8
Canada

Telephone: 1-800-267-5177 (within Canada and the United States)
1-613-952-3741 (from foreign countries other than the United States – collect calls are accepted)