

Post Doctoral Fellows and Post Doctoral Researchers

1/6/2005

The title of "Post Doctoral Fellow" is designed for people who are at the University doing research primarily as independent learners, not on assigned projects as employees; the "Post Doctoral Fellow" designation is akin to an advanced graduate student, and the IRS specifically views post doctoral fellows as non-employees.

While there are Post Doctoral Fellows at the University who fit this description, there are also some who currently have this designation but are not eligible under existing UD policy, IRS regulations, or visa status. These people must be handled differently.

Therefore, we have created the job title of "Post Doctoral Researcher" for researchers who are here primarily to work on assigned projects as employees for a limited period of time after having obtained their doctorates.

The characteristics of Post Doctoral Researchers are:

- Professional position
- Fiscal appointments
- Requires doctorate
- Minimum full-time annual rate of \$30,000
- Benefits will be charged in the same way as other professionals (this is a significant difference from post doctoral fellows)
- Annual appointments, renewable up to 2 times for a total of three years; exceptions may be approved by the appropriate Dean
- HR code information:
 - o Job code: 299990
 - o Salary plan: 272 (full-time) or 273 (part-time)
 - o Salary grade: 90

Questions regarding processing forms for post doctoral researchers, tax implications, etc., should be directed to HR systems administration. Questions concerning visa status should be directed to Foreign Student and Scholar Services.

Post Doctoral Researcher Implementation Guidelines

The position of Post Doctoral Researcher now exists and should be used when appropriate instead of Post Doctoral Fellow. The question of when this is appropriate is an academic judgment to be made primarily by the Dean in the context of the individual's actual activities and Visa status. Post Doctoral Fellows' primary responsibilities are comparable to those of graduate students: expanding their own knowledge, and often working with and guiding graduate and undergraduate students. The responsibilities of Post Doctoral Researchers are comparable to those of employees, where payment is dependent upon fulfilling an assigned work plan.

The following guidelines should be considered by Deans making the judgments.

1. Individuals with H1B Visa status cannot appropriately be classified as Post Doctoral Fellows. Any **current** Post Doctoral Fellows with this Visa status should be reclassified as soon as possible, and no later than July 1, 2005. No **new** Post Doctoral Fellow appointments should be made for people with H1B Visa status.
2. For U.S. citizens and for others when Visa status is compliant, such as permanent residents and those who hold F-1 and J-1 Visa status, **initial appointments** may be made for one year as a Post Doctoral Fellow, as long as the Dean approves that this is consistent with the expectations of the appointment. The letter of appointment should stipulate the responsibilities in a manner that is congruent with such an appointment and should be signed, or otherwise approved, by the Dean.
3. Beyond the initial year, Deans will determine on an empirical basis whether the appointment should be as Post Doctoral Fellow or Post Doctoral Researcher based on the actual activities of the individual. When Visa status is compliant, two years is expected to be the maximum length of time for someone to hold Post Doctoral Fellow status, unless there is continuing external funding specifically for a Post Doctoral Fellow for a longer period.
4. When Visa status is compliant, **current** Post Doctoral Fellows should be reviewed by the Dean and a judgment should be made as to whether they are appropriately classified as Fellows, or whether they should be Post Doctoral Researchers or some other classification. The timing of that review may coincide with the end of the Post Doctoral Fellow's current funding. That is, they may continue in this classification until the end date of their current funding source, at which point the Dean should review their classification in the context of the individual's actual activities.