



Canadian Institutes of
Health Research

Instituts de recherche en
santé du Canada

Natural Sciences and Engineering
Research Council of Canada

Conseil de recherches en sciences
naturelles et en génie du Canada

Social Sciences and Humanities
Research Council of Canada

Conseil de recherches en
sciences humaines du Canada

Tri-Agency Research Training Award Holder's Guide

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Definitions

Agency: refers to any of the three federal granting agencies — CIHR, NSERC or SSHRC

Award holder: individual who has an active award from CIHR, NSERC or SSHRC.

Award recipient: individual who has been offered an award from CIHR, NSERC or SSHRC, but has not yet activated payment for that award.

Award: directly held award (held in the award holder's name) from CIHR, NSERC or SSHRC at the master's, doctoral or postdoctoral level, or equivalent.

PDF: Postdoctoral Fellowships

CGS: Canada Graduate Scholarships

CGS D: Canada Graduate Scholarships–Doctoral

CGS M: Canada Graduate Scholarships–Master's

CIHR: Canadian Institutes of Health Research

Decision documents: document package (including attachments) received by the applicant informing them of their success in the funding opportunity competition. For CIHR, this may include the Authorization for Funding (AFF) document, which is sent after the first instalment is requested.

Deferment: a delay in the start date of the award beyond the available start dates outlined in the [start date chart](#).

Full-time: established according to institutional regulations; full-time hours vary by province and country.

Interruption: a period of leave during the tenure of award.

Medical leave: a leave for reasons of illness, disability and/or injury.

NSERC: Natural Sciences and Engineering Research Council

Parent Linked Award: For CIHR Priority Announcements, the parent linked award is the primary competition (also referred to as the “open” competition) to which a candidate applied for funding. For example, at the doctoral level, CIHR applicants apply to the open doctoral competition and may also choose to apply to an additional priority announcement within the open competition.

Parental leave: a leave of absence offered to parents who are caring for a newborn or newly adopted child. This leave may begin no later than six months after the birth or adoption of a child.

Part-time: constitutes any amount of time less than full-time hours established according to institutional regulations. This amount is based on the accommodation needs of the award holder.

PGS D: Postgraduate Scholarships-Doctoral

Primary caregiver: the person primarily responsible for the care and upbringing of a child.

Relevant work experience: in the context of an interruption of an award, work that is relevant to the area of study and that provides an opportunity to develop professional and technical skills that will complement the award holder's qualifications, beyond what can be acquired in the current program of study.

SSHRC: Social Sciences and Humanities Research Council

Tri-Agencies: the three federal granting agencies

Vanier CGS: Vanier Canada Graduate Scholarships

Introduction

In 2013, as part of the CGS Harmonization Project (CGS), the three federal granting agencies ([CIHR](#), [NSERC](#) and [SSHRC](#)) committed to harmonize the post-award policies for recipients of agency research training awards and to jointly develop the Tri-Agency Research Training Award Holder's Guide. These changes will support award holders by increasing the flexibility and accessibility of awards while award holders are pursuing their training, and by reducing administrative burden.

This guide is effective September 1, 2016, and it supersedes award holder's guides of the three federal granting agencies currently in use for the funding opportunities listed below. The stated regulations apply to all [funding opportunities](#) covered by this guide, except where otherwise indicated.

Research Training Programs Covered by this Guide

CIHR Funding Opportunities
CIHR Doctoral Research Awards: <ul style="list-style-type: none">• The Frederick Banting and Charles Best CGS Doctoral Award• The Doctoral Foreign Study Award
CIHR Fellowship Award
CIHR Clinician Scientist Award (sunset program)
CIHR Priority Driven Awards
CIHR Priority Announcements* (Parent awards: The Doctoral Foreign Study Award and CIHR Fellowship Award)
CGS to Honour Nelson Mandela *
NSERC Funding Opportunities
NSERC Doctoral Awards: <ul style="list-style-type: none">• Alexander Graham Bell CGS Doctoral Program• NSERC PGS D Program
NSERC PDF Program
SSHRC Funding Opportunities
SSHRC Doctoral Awards: <ul style="list-style-type: none">• Joseph-Armand Bombardier CGS Program-Doctoral Scholarships• SSHRC Doctoral Fellowships
SSHRC PDF
CGS to Honour Nelson Mandela *
Tri-Agency Funding Opportunities
CGS Master's Program
Vanier CGS
Banting PDF

* These opportunities are covered by this guide and should follow the rules for their parent award (as applicable).

For supplements and prizes, refer to the website of the relevant agency.

Contact Information

Points of contact for the funding opportunities (programs) covered by this guide:

Agency/funding opportunity	Contact email address	Contact mailing address
CIHR (including CIHR Finance – Awards Administration)	support@cihr-irsc.gc.ca	Canadian Institutes of Health Research 160 Elgin Street, 9th Floor Address Locator 4809A Ottawa ON K1A 0W9 Canada
CIHR CGS M	cgsma@cihr-irsc.gc.ca	
Banting PDF	banting@cihr-irsc.gc.ca	
Vanier CGS	vanier@cihr-irsc.gc.ca	
NSERC (including NSERC CGS M)	schol@nserc-crsng.gc.ca	Natural Sciences and Engineering Research Council of Canada 350 Albert Street 16th Floor Ottawa ON K1A 1H5 Canada
NSERC Finance – Awards Administration	scholarshipsadministration@nserc-crsng.gc.ca	
SSHRC (including SSHRC CGS M)	fellowships@sshrc-crsh.gc.ca	Social Sciences and Humanities Research Council 350 Albert Street PO Box 1610 Ottawa ON K1P 6G4 Canada
SSHRC Finance – Awards Administration	scholarshipsadministration@sshrc-crsh.gc.ca	

General Regulations

To hold an award, award holders must:

- abide by the terms and conditions of the award as set out in this guide, the funding opportunity and the [decision documents](#) sent by the agency;
- have met all the eligibility requirements as outlined in the [funding opportunity](#) at the time of application;
- be engaged full-time in research or be registered full-time in the program of study for which they were funded (unless they hold their award part-time for parental or medical reasons, and/or because of family-related responsibilities);
- be engaged in eligible research under the mandate of the agency to which the application was submitted;
- be progressing satisfactorily in the research or studies for which they were funded; and
- agree to immediately inform the agency of any discontinuation of studies/research, temporarily or permanently, during the tenure of the award.

The tri-agencies reserve the right to cancel any award whose award holder violates these conditions. Payments made for a period during which the award holder is no longer eligible to receive funds must be reimbursed to the agency.

Value and Duration of Award

The value and duration of the award, detailed in the [decision documents](#) sent by the agency, will be adjusted to take into account a change in status (e.g., early completion of degree/research, termination of graduate studies or discontinuation of full-time studies or research).

Acceptance or Decline of Award

The agency must be notified of the acceptance or decline of the award by the date indicated in the [decision documents](#) sent by the agency. An offer must be accepted even if the award recipient intends to defer the start date of the award.

CIHR — Vanier CGS and Banting PDF:

Award recipients must accept or decline the offer of award by completing the Response to Offer task in [ResearchNet](#) and other required steps, if applicable.

NSERC:

Award recipients must accept or decline the offer of award by sending an email to the appropriate [program contact](#), stating whether they accept or decline, and confirming the start date. To hold an award, the following conditions must be met:

- Canadian citizens must provide a copy of an official document indicating their citizenship (e.g., birth certificate, citizenship card, or passport).
- Permanent residents of Canada must provide a copy of an official document indicating their landing date in Canada (e.g., IMM 1442, IMM 5292, IMM 1000, Permanent Resident card). If the landing date was after the application deadline, NSERC will cancel the offer of award.

SSHRC:

Award recipients must accept or decline the offer of award by sending an email to the appropriate [program contact](#) stating whether they accept or decline, and confirming the start date.

CGS M:

Award recipients must accept or decline the offer of award through the [Research Portal](#).

Confirmation of Degree Completion

All PDF award recipients (including those receiving the Banting PDF and health professionals who applied to the CIHR Fellowship Award) who were unable to complete their degree as part of the application submission process must provide proof of degree completion before commencing their award. Award recipients who have not yet confirmed degree completion should complete the Degree Completion Form and send it to the appropriate [program contact](#) by the deadline indicated in the [funding opportunity](#).

Start Date

The information in the chart below shows the available starting months for the [research training awards](#) governed by this guide. The award must be activated in the same fiscal year it was awarded (from April 1 to March 31 of the following year).

In order to take advantage of the full value and duration of the award, award recipients are encouraged to take up their award on the earliest available start date. If award recipients cannot fulfil the conditions for holding an award before the latest available start date, they must decline the award.

Available Start Dates													
Agency	Funding Opportunity	First day of the month											
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
CIHR	The Frederick Banting and Charles Best CGS-D Award		✓				✓				✓		
	The Doctoral Foreign Study Award*		✓				✓				✓		
	Fellowship Award*	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
NSERC	Alexander Graham Bell CGS D Program		✓				✓				✓		
	PGS D Program at Canadian institutions		✓				✓				✓		
	PGS D Program at foreign institutions**		✓	✓	✓	✓	✓	✓			✓		
	PDF Program	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
SSHRC	Joseph-Armand Bombardier CGS D Scholarships		✓				✓				✓		
	Doctoral Fellowships		✓				✓				✓		
	PDF		✓	✓	✓	✓	✓	✓	✓	✓	✓		
Tri-Agency	CGS-M Program		✓				✓				✓		
	Vanier CGS		✓				✓				✓		
	Banting PDF	✓	✓	✓	✓	✓	✓	✓					

*CIHR Priority Announcements have the same allowable start dates as their [linked parent](#) awards.

**Available start dates must coincide with the institution's academic calendar.

Change of Start Date

Before commencing the award, the award recipient may change the start date to any other start date available to award recipients for that [funding opportunity](#). To request an available start date other than the one selected at the time of application, send an email to the appropriate [program contact](#).

CGS M:

Award recipients must contact the Faculty of Graduate Studies (or its equivalent) at the institution where they will hold the award. The institution will report this change to the agency.

Deferment of Start Date

Before activating the payment of award, the start date may be deferred beyond the available start dates outlined in the [start date chart](#). The award value and duration will not be affected by the deferment, and an award recipient may apply for more than one type of deferment consecutively. The new start date must be selected from the available start dates listed in the start date table.

A Request for Deferment of Start Date or Interruption of Award Form must be completed and sent to the appropriate agency for approval. Award recipients who have not yet begun the program of study or research for which they were awarded funding should leave the institution section of the form blank.

A deferment of start date may be requested for the following reasons:

- Parental or medical leave, and/or family-related responsibilities
 - The award start date may be deferred for up to three years.
 - The leave may be taken in increments that add up to, but must not exceed, three years.
 - Relevant supporting documents are required (e.g., birth or adoption certificate, medical note).
 - A deferment greater than one year must be confirmed by submitting a new Request for Deferment of Start Date or Interruption of Award Form on an annual basis; however, no new supporting documents will be necessary.
- Relocation, visa application, or academic calendar differences
 - The award start date may be deferred for up to two months.

CGS M:

Canadian institutions will approve start date deferments and inform the agencies.

Banting PDF:


The new start date is not limited to the original start dates available to award recipients of the Banting program; instead, any month can be chosen.

Payment of Award

Activation of Payment

To activate the award, all conditions for funding must be met.

CIHR — Vanier CGS and Banting PDF:

The award recipient must complete the Confirmation of Commencement Form on  [ResearchNet](#) and submit it to the agency.

NSERC/SSHRC:

To request the first instalment, a Request for Instalment and Reinstatement of Award Form must be completed and submitted to the appropriate agency at least one month before the start of the award.

CGS M:

Once an award recipient has accepted an offer of award in the [Research Portal](#), the institution will report to the appropriate agency that all conditions for holding the award have been met.

For all awards held at a foreign institution, as well as SSHRC PDFs held at a Canadian institution, proof of Canadian citizenship or residency status must be provided in order to request the first instalment:

- Canadian citizens must provide a copy of an official document indicating their citizenship (e.g., birth certificate, citizenship card or passport).
- Permanent residents must provide a copy of an official document indicating their landing date in Canada (e.g., IMM 1442, IMM 5292, IMM 1000, Permanent Resident card).

The agencies must receive the required forms a month in advance to ensure adherence to the [payment schedules](#); if forms are not received, payment may be delayed.

Award holders will have their instalments converted to the currency of the bank account indicated on the [direct deposit form](#).

Awards Administered by Canadian Institutions

For awards held at Canadian institutions (except for NSERC/SSHRC PDFs), award holders will be paid by the institution based on their respective payment schedule.

Once the award payments have been activated, requests are not required for subsequent instalments.

Awards Paid Directly to Award Holders

All awards held at foreign institutions, as well as NSERC/SSHRC PDFs held at Canadian institutions, will be paid directly by the agency.

For **NSERC/SSHRC** multi-year awards, the award holder must complete and submit the Request for Instalment and Reinstatement of Award Form to request subsequent instalments. In addition, some programs require annual reports to be submitted; consult the [Reporting](#) section for more information.

Payment Schedule for Payments Going Directly to Award Holders

For tenure beginning in:	First instalment to be issued by the end of:				Second instalment to be issued by the end of:				Third instalment to be issued by the end of:		Fourth instalment to be issued by the end of:	
	CIHR*	Banting PDF	NSERC	SSHRC	CIHR*	Banting PDF	NSERC	SSHRC	CIHR*	Banting PDF	CIHR*	Banting PDF
Apr	Mar/ Apr	Apr	May	N/A	Jun	Jun	Sept	N/A	Sep	Sep	Dec	Dec
May	Apr	Apr/ May	May	May	Jul	Jul	Oct	Nov	Oct	Oct	Jan	Jan
Jun	May	May/ Jun	May	Jun	Aug	Nov	Nov	Dec	Nov	Jun	Feb	Nov
Jul	Jun	Jun/ Jul	Jun	Jul	Sep	Dec	Dec	Jan	Dec	Jul	Mar	Dec
Aug	Jul	Jul/ Aug	Jul	Aug	Oct	Jan	Jan	Feb	Jan	Aug	Apr	Jan
Sep	Aug	Aug/ Sep	Aug	Sep	Nov	Feb	Feb	Mar	Feb	Sep	May	Feb
Oct	Sep	Sep/ Oct	Sep	Oct	Dec	Mar	Mar**	Apr	Mar	Oct	Jun	Mar
Nov	Oct	N/A	Oct	Nov	Jan	N/A	May	May	Apr	N/A	Jul	N/A
Dec	Nov	N/A	Nov	Dec	Feb	N/A	May	Jun	May	N/A	Aug	N/A
Jan	Dec	N/A	Jan	Jan	Mar	N/A	Jun	Jul	Jun	N/A	Sep	N/A
Feb	Jan	N/A	N/A	N/A	Apr	N/A	N/A	N/A	Jul	N/A	Oct	N/A
Mar	Feb	N/A	N/A	N/A	May	N/A	N/A	N/A	Aug	N/A	Nov	N/A

*CIHR Priority Announcements have the same allowable payment schedules as their linked parent awards.

** If there are insufficient funds at fiscal year-end (March 31), payment will be issued by the end of May.

NOTE: CIHR pays in quarterly instalments. The research allowance (if applicable) is paid annually, one month ahead of the anniversary of the start date of the award. NSERC and SSHRC pay in biannual (twice yearly) instalments.

Payment Method

Direct Deposit

Direct deposit is available to award holders hosted at foreign institutions and SSHRC and NSERC PDFs hosted at Canadian institutions.

To set up direct deposit, complete the required Direct Deposit Form and submit it to the appropriate agency using the contact information listed in the form. For direct deposit to a bank account that is in a foreign country, or any amount over \$5,000, the Receiver General of Canada requires the agency to perform a due diligence process.

- The agency will send a test payment in the amount of \$5 to the bank account. Award recipients will receive an email advising them that there will be a deposit to their bank account within 72 hours.

- Once the agency receives confirmation that the test payment was received, the agency will set up the transfer of the remainder of the current instalment, and future instalments for payment via direct deposit.
- Any change in banking information will result in a new due diligence process.

Complete the appropriate Direct Deposit Form:

[Canada Direct Deposit Form](#)

[United States Direct Deposit Form](#)

[Europe Direct Deposit Form](#)

[Great Britain Direct Deposit Form](#)

For payments to other countries, please send a request to CIHR support@cihr-irsc.gc.ca, NSERC payables@nserc-crsng.gc.ca, or SSHRC payables@sshrc-crsh.gc.ca.

Part-time Support

Award holders may hold their awards part-time for parental or medical reasons and/or because of family-related responsibilities. Award holders can work with their institutions to design the part-time arrangement that best accommodates their individual needs. These arrangements must first be approved by the institution, and then submitted to the [program contact](#) for final approval.

The awarded amount will not be affected by the part-time support arrangement; however, the duration and value of the award will be prorated accordingly. If the award is conditional upon registration status at the institution, in order to request part-time support, the registration status should reflect this part-time status.

CGS M:

Canadian institutions must approve part-time arrangements and inform the appropriate agency.

Interruption of Award

An award may be interrupted after it has been activated.

- All interruptions must be approved by the institution before being submitted to the agency.
- A Request for Deferment of Start Date or Interruption of Award Form must be completed and the required supporting documentation must be sent to the [program contact](#) for approval at least one month before the start of the interruption.
- The end date of the award will be extended by the duration of the leave.

Interruption requests will be considered only for the reasons outlined below.

Unpaid Interruptions

Relevant Work Experience (Employment)

An interruption can be requested to gain relevant work experience (employment). An award may be interrupted for a maximum period of four months for one-year awards, or 25% of the original duration of the award, whichever is greater, for the purposes of relevant work experience (employment). This may include some internship awards, such as MITACS-Accelerate.

- If the relevant work experience is a mandatory part of the program of study, no interruption is needed and payment of the award can continue.
- Interruptions may be taken as one large interruption or in smaller increments.
- Extensions to the original interruption period can be requested providing the allowed maximum duration has not been exceeded.
- Interruptions for this purpose do not affect the period of time allowed for other interruptions.

Parental, Medical, and/or Family-Related Responsibilities

An award may be interrupted for a period of up to three years for parental or medical reasons and/or because of family-related responsibilities.

- Interruptions may be taken as one large interruption or in smaller increments.
- Interruptions for this purpose do not affect the period of time allowed for other interruptions.
- Permission for an interruption will require appropriate supporting documentation (e.g., birth or adoption certificate, medical note).

Interruptions greater than one year must be confirmed by submitting a new Request for Deferment of Start Date or Interruption of Award Form on an annual basis; however, no new supporting documents will be necessary.

Paid Interruption

Parental Leave

An award may be interrupted for a period of up to six months for paid parental leave.

- Interruptions for this purpose must be taken within six months following the birth or adoption of the child.
- Award holders may request a parental leave for every occasion of birth and/or adoption that occurs during the tenure of their award.
- Multiple births upon the same occasion (e.g., twins) do not increase the duration or the value of the leave.
- Interruptions require supporting documentation such as proof of birth or adoption before reinstatement of the award.
- Award holders must be the primary caregivers for the entire duration of the interruption.
- Award holders must confirm that they are not eligible for other paid parental leave benefits during the six-month parental leave paid by the agency.
- The supplement is equivalent to the value of the monthly stipend for up to six months.
- If both parents hold a federal granting agency award and choose to request paid parental leave from their agencies, they must share the paid leave for a cumulative maximum of six months.
- Interruptions for this purpose do not affect the period of time allowed for other interruptions.

- Approval of paid parental leave is subject to the availability of agency funds.

Reinstatement of Award

To reinstate the award, the [program contact](#) must receive a completed Request for Instalment and Reinstatement of Award Form. Requests for reinstatement of award should be submitted at least one month before the return to their research or studies. If forms are not received, payment may be delayed.

NSERC/SSHRC Doctoral awards administered by Canadian institutions and CGS M:

Canadian institutions will confirm that the award holder returned to research or studies and will inform the agency.

Changes to the Award

Award holders may make changes to the award. The following outlines allowable changes and requirements for requesting them.

CGS M:

Canadian institutions will approve any changes and will inform the agency.

CIHR Priority Announcement Awards:

Award holders remain subject to the eligibility requirements of the Priority Announcement under which they were awarded.

Change of Institution/Place of Tenure

Changes of institution

Changes of institution must be approved by the agency. In all cases, the eligibility rules laid out by the [funding opportunity](#) continue to apply.

NSERC/SSHRC doctoral awards:

- To change the institution before activation of payment, complete and submit a Request for Instalment and Reinstatement of Award Form indicating the new institution.
- To change the institution after activation of payment, complete and submit the Changes to Award Form.

NSERC/SSHRC PDF:

To change the place of tenure either before or after award activation, submit the Changes to Award Form along with the following information:

- a letter explaining what has changed since the submission of the original application to make the new institution a more appropriate location for the applicant to pursue his or her research and advance his or her career than the institution originally selected;

- SSHRC only: a letter of support from the proposed institution demonstrating how it will support effective research training and career development based on SSHRC's [Guidelines for Effective Research Training](#).

Applicants may transfer to a foreign institution only if they completed their doctorate at a Canadian institution.

CIHR:

To change the place of tenure either before or after the activation of payment, complete and submit the Changes to Award Form and attach a letter providing the effective date of the proposed change and a justification for the proposed relocation (e.g., the research environment is not currently available at the current location or in Canada). If the research environment is not currently available in Canada, include a description of the unique aspects of the proposed research environment (maximum one page).

CGS M, Vanier CGS and Banting PDF:

No changes to institution are permitted for these programs.

Changes in Department or Faculty

Changes in department or faculty within the same institution are approved by the institution. If the change in department results in a change in research, refer to the section [Changes to the program of study, research project or degree](#), for the appropriate steps.

Banting PDF:

The official signatory will be asked to confirm (in the Changes to Award Form) that the institutional support will continue.

Change of Supervisor(s)

CIHR Awards, Banting PDF and Vanier CGS:

Changes in supervisor(s) must first be approved by the institution, and then submitted to the agency for final approval. When informing the agency or requesting approval, award holders must complete the Changes to Award Form and send it to the [program contact](#). In addition:

- **CIHR awards only:** The proposed new supervisor must provide a copy of the Common CV (validated for CIHR), including his or her publications list (maximum two pages).
- **Banting PDF only:** The official signatory will be asked to confirm (in the Changes to Award Form) that the institutional support and the synergy between the application and the strategic priorities of the host institution will continue.

NSERC/SSHRC and CGS M:

Changes in supervisor(s) are approved at the institution.

NSERC:

Postdoctoral fellows may not hold their award with their PhD supervisor, even if the supervisor has changed research institution.

Changes to the Program of Study, Research Project or Degree

Award holders may make changes to their research projects. For new research that clearly remains within the mandate of the agency to which the application was submitted, the approval processes are outlined below.

CIHR, SSHRC, Vanier CGS and CGS M:

Changes to the program of study, research project or degree are approved by the institution.

CIHR Priority Announcements:

Approval for changes to the research project must be obtained by completing the Changes to Award Form, and submitting it with a letter describing the new research project (including project title) and justification for the change (maximum one page).

NSERC:

Approval must be obtained from the agency, by completing the Changes to Award Form and other required documents.

Banting PDF:

All changes to the research project of a Banting PDF award must be approved by the agency. The official signatory will be asked to confirm (in the Changes to Award Form) that the institutional support and the synergy between the application and the strategic priorities of the host institution will continue.

Changes to research that fall under the mandates of more than one agency must first be approved at the institution and then submitted to the agency for final approval. The research must remain eligible for funding under the mandate of the agency to which it was submitted. The individual agencies reserve the right to cancel any award that no longer falls under their mandate. For more information on subject matter eligibility, see Science.gc.ca.

Award holders must complete the Changes to Award Form, attach a one-page summary of the proposed research, and send it to the [program contact](#). This summary should provide an outline of the research question, context, objectives, methodology, contribution to the advancement of knowledge, and a short justification of why the proposed research remains eligible for funding at the agency.

Other Sources of Income (Employment and Other Awards)

The agencies do not place restrictions on outside sources of funding or employment that award holders may have while holding the award or taking an approved leave of absence, providing the following regulations are adhered to:

- When considering other sources of income, any institutional regulations must be followed.
- Award holders, except for those holding their award part-time or those who have been granted approved leave, must devote full-time hours to the research or studies for which they were funded.
 - Full-time hours may vary depending on the institution at which award holders are completing their award.

Reporting

Annual progress reports and final reports are required by most funding opportunities, as outlined in the chart below. The agencies reserve the right to cancel any award that fails to demonstrate satisfactory progress. The annual progress report (s), if required by the agency, should be submitted along with the Request for Instalment and Reinstatement of Award Form, on the anniversary of the start date of the award.

In addition, award holders will be invited to contribute to the review and evaluation of the funding opportunity, associated policies and processes by participating in evaluation studies, surveys, workshops and audits, and to provide data or reports as requested for the purpose of collecting information to assess progress and results.

Reporting Requirements Specific to Each Funding Opportunity

Agency	Funding Opportunity/Agency	Reports Required	
		Annual Progress Report	Final Report
CIHR	Awards at Canadian institutions	The institution will confirm the award holder's continuing eligibility with CIHR in mid-February of each year.	Coming soon — The CIHR End of Award Report
	Awards at foreign institutions	A template letter will be sent from CIHR to award holders to be completed in collaboration with the institution.	Coming soon — The CIHR End of Award Report
NSERC	Alexander Graham Bell CGS D Program	The institution will process an annual progress report on behalf of NSERC.	N/A
	NSERC PGS D Program at Canadian institutions		
	NSERC PGS D Program at foreign institutions	Annual Progress Report	N/A
	NSERC PDF Program	Annual Progress Report	N/A
SSHRC	Joseph-Armand Bombardier CGS Program Doctoral Scholarships	The institution will process an annual progress report on behalf of SSHRC.	N/A
	SSHRC Doctoral Fellowships held at Canadian institutions		
	SSHRC Doctoral Fellowships held at foreign institutions	Annual Progress Report (for Doctoral Award Holders)	Final Report (for Doctoral Fellowship Holders only)
	SSHRC PDF	Annual Progress Report (for Postdoctoral Award Holders)	Final Report (for Postdoctoral Fellowship Holders only)

	CGS Master's Program	N/A	N/A
Tri-Agency	Vanier CGS	The institution will confirm the award holder's continuing eligibility with CIHR.	Coming soon — The Vanier CGS End of Award Report
	Banting PDF	A template letter will be sent from CIHR to award holders to be completed.	Fellows will be contacted to complete the Banting PDF End of Award Report.

Termination of Award

When an award holder is no longer eligible to hold the award (for example, if the award holder completes the program of study early, or discontinues [full-time studies](#) or research) a Termination of Award Form must be submitted to the [program contact](#) and supporting documents may be required. To confirm continued eligibility, review the decision documents and the funding opportunity. In addition, some programs require final reports; consult the [Reporting](#) section for more information.

The agency will contact award holders to reclaim any overpayment of the award.

CIHR:

For award holders at Canadian institutions, in the case of an overpayment of funds the institution will reclaim these funds, to be returned to the agency. For award holders paid directly by the agency, unused research allowance funds must be returned to the agency. Expenses may be incurred up to three months beyond the award termination date. After three months, all expenses must be paid and/or reconciled and the account must be finalized and closed.

CGS M:

Canadian institutions will confirm early terminations and inform the agencies.

Taxation and Immigration

Individual students may be exempted from federal and provincial income tax attributed to their award, see "[Line 323 - Tuition, education, and textbook amounts](#)," available from the Canada Revenue Agency, for the applicable conditions.

Postdoctoral awards are taxed as income in Canada, regardless of whether they are held inside or outside Canada.

Award recipients receiving payments through Canadian institutions will be issued tax forms by the institution rather than by the agency. The agency issues T4A slips in February to directly paid award recipients.

Since no deductions are made at source by the agency, award recipients are responsible for determining the amount of tax they must pay, and for arranging payment of this amount to the Canada Revenue Agency. For information, call toll-free 1-800-959-5525 for services in English or 1-800-959-7775 for services in French.

Award recipients can obtain information about the amount and method of payment, the deductions allowed, and the receipts required from [their local tax services office](#) of the Canada Revenue Agency. Residents of Quebec must also contact [Revenu Québec](#).

If award holders hold or intend to hold their award at an institution outside Canada, they must contact the appropriate agencies for immigration and taxation regulations. The agency cannot advise award holders on such matters.

Appendix: Summary of Changes

Harmonized Policies	CIHR	NSERC	SSHRC
A1) Deferment of training award start date (parental and medical reasons and family-related responsibilities) <ul style="list-style-type: none"> ➤ For up to three years for reasons that include <i>parental and medical reasons and family-related responsibilities</i> 	✓ (originally 1 month)	No change	No change
A2) Deferment of training award start date (relocation, visa, or academic calendar differences) <ul style="list-style-type: none"> ➤ For up to two months for purposes that include <i>relocation, visa or academic calendar differences</i> 	✓ (originally 1 month paid)	✓ (originally N/A)	✓ (originally N/A)
B) Unpaid interruption for relevant work experience (employment) <ul style="list-style-type: none"> ➤ For a period up to 25% of the duration of the award, or four months, whichever is greater 	✓ (originally 12 months)	✓ (originally 4 month interruptions)	✓ (originally 4 month interruptions, none for postdocs)
C) Unpaid interruption of training award (parental and medical reasons and family-related responsibilities) <ul style="list-style-type: none"> ➤ For up to three years for the reasons that include <i>parental or medical reasons and family-related responsibilities</i> 	✓ (originally 1 year leave, 6 months paid for medical)	No change	No change
D) Paid interruption for parental leave <ul style="list-style-type: none"> ➤ For up to six months following the birth or adoption of a child 	Harmonized 2015	Harmonized 2015	Harmonized 2015
E) Part-time support for training awards (parental and medical reasons and/or family-related responsibilities) <ul style="list-style-type: none"> ➤ Prorated support of training awardees for reasons that include <i>parental and medical reasons and/or family-related responsibilities</i> 	✓ (originally N/A)	✓ (originally various restrictions)	✓ (originally various restrictions)
F) Other sources of income <ul style="list-style-type: none"> ➤ No agency restrictions on other sources of income while holding or on leave from a training award. Institutions' policies on employment during the tenure of a training award apply 	✓ (originally various restrictions)	✓ (originally various restrictions)	✓ (originally various restrictions)