




School of Graduate Studies
Office of Postdoctoral Affairs
Postdoctoral Scholar/Fellow Appointment Process

1. Identify open position(s)
2. Determine if advertising is necessary/Advertise
3. Identify candidates
4. RA sends to the candidate the following:
 - a. Application for Appointment (obtain other paperwork asked for on application)
5. PI interviews candidates
6. PI selects final candidate
7. PI notifies Research Administrator (RA) to hire candidate
8. RA sends the following to the candidate:  **Start at #8 if you only have one candidate for the position**
 - a. The unofficial Letter of Offer from the Chair (optional)
 - b. Foreign Visitor Information Form (if applicable)
9. RA sends the following to the Office of Postdoctoral Affairs (OPA):
 - a. Copy of unofficial Letter of Offer (optional)
 - b. Scholars/Fellows Appointment Form
 - The form must be signed by the following:
 - Arts & Sciences : Dept/Program Chair, Dean, and A&S HR & Finance Officer
 - School of Medicine: Dept/Program Chair and Director of Finance (Ed Bruss)
 - c. Application for Appointment (if applicable)
 - d. Additional Information:
 - CV
 - Official Transcripts (translated if applicable)
 - 3 References
 - Original Reprints (if applicable)
 - TOEFL Scores (if applicable)
 - Any Other Supporting Documents
10. OPA sends the official Letter of Offer to the following:
 - a. The candidate (original) along with an “Upon Arrival to Campus” checklist and map
 - b. The department (copy)
 - c. The Office of Foreign Faculty and Scholars (FFS) – if applicable (original)
 - d. Human Resources, Information Management Dept. (copy)
 - e. School’s/College Administrative Services and/or Finance Office (copy)
11. **Foreign Postdocs Only:** RA sends the following to the FFS.

RAs: Please forward copies of all documents to the OPA for the official file:

 - a. Foreign Visitor Information Form
 - b. Recommendation for Appointment of Exchange Visitor (J-1) **or**
 - c. Recommendation for Appointment of Temporary Worker (H-1B1, Specialty Occupations)
12. When the candidate has accepted offer, she/he will indicate by countersigning the offer letter and sending back to the OPA.
13. RA will complete the following with/for the new Postdoc:

- a. Personal Data Salary Authorization Form – send directly to payroll (or SOM Admin Services, where applicable)

Payroll Titles

Postdocs should be entered into the University Payroll System with one of two possible job titles:

1. Postdoctoral Scholar (expense class 1320)
2. Postdoctoral Fellow (expense class 7250)

These two titles are defined in the Postdoctoral Trainee Handbook. It is critical to appoint postdocs using the correct Code and Title as the titles have different payroll and tax implications.

Grant Accounts

Bonnie Wehrschmidt in Grants Accounting will approve all PD forms with Grant accounts.

- b. Fill out a Key Request Form for Postdoc to take to Access Services
 - c. Contact Access Services about building/lab/office access for ID card
15. Upon Arrival to Campus, Postdocs should:
- a. Check in with the department
 - b. Go to the Human Resources Information Management department (220 Crawford Hall):
 - make sure that they are in the computer system (take copy of appointment letter)
 - fill out federal and state tax forms (domestic postdocs only)
 - c. Enroll in or waive the Postdoctoral Benefits Plan online at <http://www.garnett-powers.com/case/>.
 - d. Get a Case I.D. and Parking Permit:
 - Obtain an authorization form from Human Resources Information Management department
 - Go to Access Services (Crawford Hall, Room 18) to get your I.D. card and purchase a parking tag (if applicable)
 - e. Set up Email Account on-line at www.its-services.case.edu/middleware/NetworkTools/userReg.html
 - f. The Postdoc needs to have all immunizations and/or lab training (i.e. bloodborne pathogen, etc.) completed before beginning lab work.
 - g. The Postdoc and the PI should discuss any additional arrangements that are needed before the official start date.
 - h. The Postdoc and PI together should fill out an Individual Development Plan (available on our website at www.cwru.edu/provost/gradstudies/postdoc.html and will be given to the postdoc during the OPA welcome session).

Foreign Postdocs Only:

- a. Need to report to the Office of Foreign Faculty and Scholars within 3 days
- b. Will be assigned temporary ID number, if they do not have social security number
- c. OFFS will send them to the Social Security Office to apply for SSN
- d. Foreign Postdocs will be given tax forms by the Office of Foreign Faculty and Scholars
 - FFS will keep original I-9
 - FFS will verify documents with tax status
 - FFS will send the Postdoc with the tax documents to HR
 - FFS will send any updates to HR

16. Postdoc Welcome Session – Office of Postdoctoral Affairs

- a.** Postdoc Handbooks
- b.** Physical/Training Sessions
- c.** Benefits
- d.** Postgraduate Audit Program
- e.** Postdoc Researchers Association
- f.** IDP Forms
- g.** Turn in any missing paperwork