

Budget Approval and Offer Request

School of Dental Medicine, Case Western Reserve University

Updated February 2012

Instructions

Hiring a Research Associate requires a different process than a regular staff position. The majority of the process takes place within the SODM with little involvement by Human Resources.

Listed below are the necessary steps to appoint a Research Associate or Senior Research Associate. Please read and follow them carefully to ensure a quick and smooth process. Any questions regarding this process should be directed to Tricia Ribeiro at dentres@case.edu or 368-1630.

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- 1. Confirm funding** for the new appointment will be available for the entire appointment period which should be within the current period of performance.
 - If the position is supported by a sponsored project, a revised forecast must be prepared to ensure that funding will be available for the **entire** appointment. This is not necessary if the request is being prepared for a replacement unless there will be a change in salary support.
 - Funding that overlaps non-competing continuation years is acceptable.
 - Funding that crosses over competing renewal years is unacceptable since the SODM has no guarantee of renewal funding. This is also true of sponsored projects in the last year of the period of performance when an extension is anticipated. Except in cases of Federal projects awarded under FDP that allow an automatic no-cost extension, there is no guarantee that an extension will be granted.
 - If this situation arises, the appointment will be made for the guaranteed timeframe. When confirmation is received of the extended time and/or funding, the appointment can be modified.
 - 2. Complete Part A of the Budget Approval and Offer Request** form that is available on the SODM research website and route it and the revised forecast, if necessary, to Tricia Ribeiro in Finance and Operations for SODM for review. Please do not proceed to step #3 until this has been done. You will get the original form back once the budget has been reviewed.
 - 3. Advertise the position.** University best practices are that a position should be publically advertised for a minimum of five (5) days. Even if you already have a candidate in mind, posting the opening is suggested to allow for a more diverse candidate pool. For posting on the CWRU website, contact JuWanda Rowell (jxr42@case.edu, 368-4504) to request a posting. When a candidate has been selected, you will need to request the post be removed.
 - Posting in trade journals, newspapers, websites, etc. is the responsibility of the hiring department.
 - 4. Interview and select the candidate.**
 - 5. Complete Part B of the Budget Approval and Offer Request** that was partially filled out before posting. Return all the required documentation listed on the form and return it to Tricia Ribeiro in the Office of Finance and Operations.
 6. Once all documentation has been received, the Office of Finance and Operations will generate an offer letter for the selected candidate and give this letter to the Department Contact to collect the appropriate signatures. The offer letter instructs the candidate to return a signed copy to the Office of Finance and Operations. With this letter in hand, the Office of Finance and Operations will work with your department to set up an appointment for the candidate to meet with HR so that the remainder of the employment paperwork can be completed. At this time, orientation will be scheduled for the candidate. PLEASE NOTE that the candidate **may not** begin working in the School of Dental Medicine until the required orientation class has been completed.