

Office of Postdoctoral Affairs  
**Postdoc Checklist**

**UPON ARRIVAL TO CAMPUS:**

☐ **CHECK-IN WITH YOUR FACULTY MENTOR**

☐ **I-9 FORM (EMPLOYMENT ELIGIBILITY VERIFICATION) AND NEW HIRE PAPERWORK:**

- **FOREIGN POSTDOCS** should schedule an appointment to check in with the Office of Immigration and Human Resource Services NO LATER THAN YOUR START DATE (220 Crawford Hall) **Please refer to emails that were sent to you with instructions on how to make an appointment and documents that you should bring.** The Immigration Office will assist you with completing the I-9 form, obtaining a social security number, tax status and documentation, and other issues related to being a foreign postdoc.
  - **POSTDOCS WITH J-1 VISAS:** please make an appointment with the HR Immigration team by selecting an available appointment on this Google Calendar: <http://goo.gl/ygUZ6M>. Please make sure to consider the time zone/ time changes when making your appointment.
- **DOMESTIC POSTDOCS** must report to the Human Resources Service Center in Crawford Hall, room 320 to complete the I-9 form and new hire paperwork **no later than the start date** listed in your appointment letter.
- **ALL POSTDOCS: When you check in with Human Resources, please bring a copy of your offer letter and your acceptable I-9 documents.** See the attached list for what are considered to be acceptable I-9 documents. Employees may present one selection from *List A* **OR** a combination of one selection from *List B* **AND** one selection from *List C*.
- Failure to complete the I-9 form by the start date will result in your start date (and pay) being amended to the date you signed the I-9 form. **You will not be paid until the I-9 form is completed.**

*\* Your information will not be entered into the Human Resources computer system (nor will you receive a paycheck) until they have a copy of your signed letter, all applicable paperwork, and your social security number.*

☐ **OBTAIN A CWRU I.D. CARD AND PARKING PERMIT**

The Service Center will provide you with an I.D./Parking authorization form once all paperwork is completed. This can be taken to Access Services located on the ground level of Crawford Hall to get your I.D. and purchase a parking tag (if applicable).

☐ **ATTEND POSTDOC ORIENTATION**

Please email Diana Fox, Director of Postdoctoral Affairs, to register for Postdoc Orientation, which includes a review of the Postdoctoral Benefits Program and information related to your postdoc experience here at Case. Check out the postdoc website: <http://postdoc.case.edu/>.

Diana Fox, Director of the Office of Postdoctoral Affairs

Tomlinson Hall, Room 215

[diana.fox@case.edu](mailto:diana.fox@case.edu)

215-368-0947

## ☐ THE POSTDOCTORAL BENEFITS PROGRAM (PBP) – ENROLL AFTER POSTDOC ORIENTATION

- Single coverage in the PBP for Postdoctoral Scholars & Fellows should be paid by the fellowship/grant or your faculty advisor/department. There are no out-of-pocket monthly premium costs for postdocs with single coverage.
- All postdocs must either enroll in or waive the plan online. For information about the plan and to enroll online, go to <http://clients.garnett-powers.com/case/>. **You must enroll within 30 days of your start date.**
- Your benefits begin on your official first day of employment (the day you sign the I-9 form).
- Fill out the Life Insurance Beneficiary form and scan it to Diana Fox, [diana.fox@case.edu](mailto:diana.fox@case.edu).
- If you have any questions about the PBP, contact Garnett-Powers & Associates (GPA) at 1-888-315-4550 or [casepbp@garnett-powers.com](mailto:casepbp@garnett-powers.com).
- **FOREIGN POSTDOCS:** If you do not have a social security number yet, please use your **visa number** in place of the social security number when enrolling online in the benefits program. Please type in the letter "V" in front of your visa number. Example: V202291530.
- **POSTDOCS who will be living OUT-OF-STATE (or outside of the greater Cleveland area):** Please note that **there will be limits on your benefit plan options.** Some plans service only the greater Cleveland area (about 50-75 miles around Cleveland). If you have questions about your eligibility for a benefits plan, please contact Garnett-Powers & Associates at 1-844-315-4550, or via email at [casepbp@garnett-powers.com](mailto:casepbp@garnett-powers.com). For more information review their website: <http://clients.garnett-powers.com/case/>.

## ☐ CWRU NETWORK ID AND EMAIL ACCOUNT SETUP

- When you are appointed as a new CWRU postdoc your network ID and email account are automatically created! You must be entered in the HCM system by Human Resources first in order to have access to ID activation. Once you are entered in the HCM system, you just need to activate them on-line at <https://webapps.case.edu/wizard/idcheck/>.
- If you need assistance email [network-id@case.edu](mailto:network-id@case.edu) or contact the Help Desk at 368-HELP (x4357).
- **FOREIGN POSTDOCS** (that do not have a social security number yet): please contact the ITS department by emailing [network-id@case.edu](mailto:network-id@case.edu). They will be able to create a temporary ID number for you to get your network account up and running until you get your "real" social security number (SSN). Once you receive your SSN, please contact [network-id@case.edu](mailto:network-id@case.edu) so that your record can be updated.

## ☐ CHECK-IN WITH YOUR DEPARTMENT ADMINISTRATOR

Your department should cover the following with you:

- Payroll Authorization: Your department will do the internal paperwork regarding your appointment and payroll.
- Keys/Building/Lab/Office Access: Your department will take care of setting up building/lab/office access for you on your CWRU I.D. card and set up getting keys if necessary.

## ☐ HUMAN CAPITAL MANAGEMENT SYSTEM (HCM)

Human Capital Management, more commonly known as HCM, is the human resources database of record at CWRU. The Employee Self Service module\*\* of HCM is available to all employees/postdocs.

- HCM System Login, use your CWRU network ID and password to login.
- Set up paycheck direct deposit:  
[http://www.case.edu/finadmin/controller/pdf/HCM\\_DirectDeposit\\_guide.pdf](http://www.case.edu/finadmin/controller/pdf/HCM_DirectDeposit_guide.pdf)
- Access your on-line paycheck:  
[https://www.case.edu/projects/erp/learning/grg/PayrollInformation\\_02-10.pdf](https://www.case.edu/projects/erp/learning/grg/PayrollInformation_02-10.pdf)
- Pay Days: Postdocs are paid monthly, on the last working day of the month.

*\*\* Please note that some HCM functions are not applicable to postdocs, such as Benefits Information, Time Entry, etc.*

## ☐ **ATTEND MANDATORY SAFETY TRAINING & HEALTH SCREENINGS**

You must work with your department/lab, through the Department of Occupational and Environmental Safety (DOES), to determine what safety training, health screenings or other safety measures are required by University policy and arrange to satisfy these requirements **prior** to beginning service in said facilities.

- The Department of Occupational & Environmental Safety provides training for: OSHA Lab Standards, Bloodborne Pathogens, Respirator, Hazard Communication, Vehicle Safety, X-Ray, Laser, and Radiation Training. To schedule training for X-Ray, Radiation, and Laser Training please call 368-2906. To schedule all other training contact the department at 368-2907. Check out their training website: <https://www.case.edu/ehs/Training/>.
- For animal care training please go to <http://casemed.case.edu/ora/iacuc/training.cfm>. **NOTE:** You will need a valid Case network ID and password to access this site. If you have further questions you can also contact the Animal Resource Center on campus at 216-368-3084.
- Departments should monitor this training to determine when postdocs may safely begin research and other laboratory duties.
- Discuss with your faculty mentor or lab manager the appropriate health screenings needed for the exposures that have been identified in your lab.
- **CONTACT HEALTH SERVICES** 216-368-2450 to obtain the appropriate immunizations, etc. needed for the exposures that have been identified. Baseline screenings are required for those that are working in the laboratory.

## ☐ **GET INFORMED ABOUT PAYING U.S., STATE, AND LOCAL TAXES**

Interpretation and implementation of tax laws is the domain of the IRS (Internal Revenue Service). Postdoctoral Scholars and Fellows should consult their local IRS office about the applicability of the current tax codes, information about tax code changes, taxability of fellowship stipends, and the proper steps to be taken regarding their tax obligations. Case Western Reserve University staff and faculty are not allowed to provide tax advice. However, we can direct you to some helpful web sites:

- **Federal Taxes:** Internal Revenue Service (IRS): 1-800-829-1040 or [www.irs.gov](http://www.irs.gov)
- **Scholarships, Fellowships, Grants & Tuition Reductions:**  
<http://www.irs.gov/publications/p970/ch01.html>
- **State Taxes:** Ohio Department of Taxation [www.tax.ohio.gov](http://www.tax.ohio.gov)
- **Overview of Tax Issues for Postdocs:**  
<http://www.nationalpostdoc.org/?page=TaxIssues&hhSearchTerms=%22overview+and+tax+and+issues%22>
- **CWRU Human Resources Compensation Office** can answer questions about pay you receive: 220 Crawford Hall or <http://www.case.edu/finadmin/humres/comp/>
- **Tax Treaty Information:** Contact the CWRU Office of Immigration and Human Resource Services: 220 Crawford Hall, 368-4289 or [www.case.edu/finadmin/humres/ffs/](http://www.case.edu/finadmin/humres/ffs/)

## LISTS OF ACCEPTABLE DOCUMENTS

### All documents must be UNEXPIRED

Employees may present one selection from List A  
or a combination of one selection from List B and one selection from List C.

<b>LIST A</b>  <b>Documents that Establish Both Identity and Employment Authorization</b>	OR	<b>LIST B</b>  <b>Documents that Establish Identity Employment</b>	<b>LIST C</b>  <b>Documents that Establish Authorization AND</b>
<ol style="list-style-type: none"> <li>1. U.S. Passport or U.S. Passport Card</li> <li>2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)</li> <li>3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa</li> <li>4. Employment Authorization Document that contains a photograph (Form I-766)</li> <li>5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status:               <ol style="list-style-type: none"> <li>a. Foreign passport; and</li> <li>b. Form I-94 or Form I-94A that has the following:                   <ol style="list-style-type: none"> <li>(1) The same name as the passport; and</li> <li>(2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form.</li> </ol> </li> </ol> </li> <li>6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI</li> </ol>		<ol style="list-style-type: none"> <li>1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address</li> <li>2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address</li> <li>3. School ID card with a photograph</li> <li>4. Voter's registration card</li> <li>5. U.S. Military card or draft record</li> <li>6. Military dependent's ID card</li> <li>7. U.S. Coast Guard Merchant Mariner Card</li> <li>8. Native American tribal document</li> <li>9. Driver's license issued by a Canadian government authority</li> <li><b>For persons under age 18 who are unable to present a document listed above:</b></li> <li>10. School record or report card</li> <li>11. Clinic, doctor, or hospital record</li> <li>12. Day-care or nursery school record</li> </ol>	<ol style="list-style-type: none"> <li>1. A Social Security Account Number card, unless the card includes one of the following restrictions:               <ol style="list-style-type: none"> <li>(1) NOT VALID FOR EMPLOYMENT</li> <li>(2) VALID FOR WORK ONLY WITH INS AUTHORIZATION</li> <li>(3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION</li> </ol> </li> <li>2. Certification of Birth Abroad issued by the Department of State (Form FS-545)</li> <li>3. Certification of Report of Birth issued by the Department of State (Form DS-1350)</li> <li>4. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal</li> <li>5. Native American tribal document</li> <li>6. U.S. Citizen ID Card (Form I-197)</li> <li>7. Identification Card for Use of Resident Citizen in the United States (Form I-179)</li> <li>8. Employment authorization document issued by the Department of Homeland Security</li> </ol>

**Examples of many of these documents appear in Part 8 of the Handbook for Employers (M-274).**

**Refer to the instructions for more information about acceptable receipts.**

# All Postdocs: must **ENROLL IN** --- **or WAIVE** --- **the** Postdoctoral Benefits Program

**All Postdocs:** You will not automatically receive coverage, you must enroll to activate your benefits.

**Research Associate transferring to Postdoc Scholar or Fellow:** Your benefits change from the employee program to the postdoc program, you must enroll to activate your postdoc benefits.

For more information please review Garnett-Powers & Associates' website: <http://clients.garnett-powers.com/case/>. You can contact them at 1-844-315-4550, online at [Contact Case-PBP Customer Service](#), or via email at [casepbp@garnett-powers.com](mailto:casepbp@garnett-powers.com).



## **Postdoc Sick and Vacation Time**

### **Vacation Days**

Postdocs need to have paid time off for recreational, religious, cultural, and other personal reasons. A reasonable period of time per fiscal year is allowable regardless of the reason for using the time and the University prefers to provide this time as vacation days.

Vacation days may be used at the postdoc's discretion and with the mentor's approval, provided that:

- The time off is pre-scheduled and coordinated with other time off
- The time off is used in whole or half-day increments

Postdoc's accrue vacation days monthly and may use them as the days accrue at any point during the fiscal year. Unused earned vacation days can also be carried over to the next fiscal year. The maximum amount of days that can be carried over cannot exceed the postdoc's maximum annual allowance.

- Upon appointment - 5 years of service: 1.33 days per month (16 days per year)

### **Sick Days**

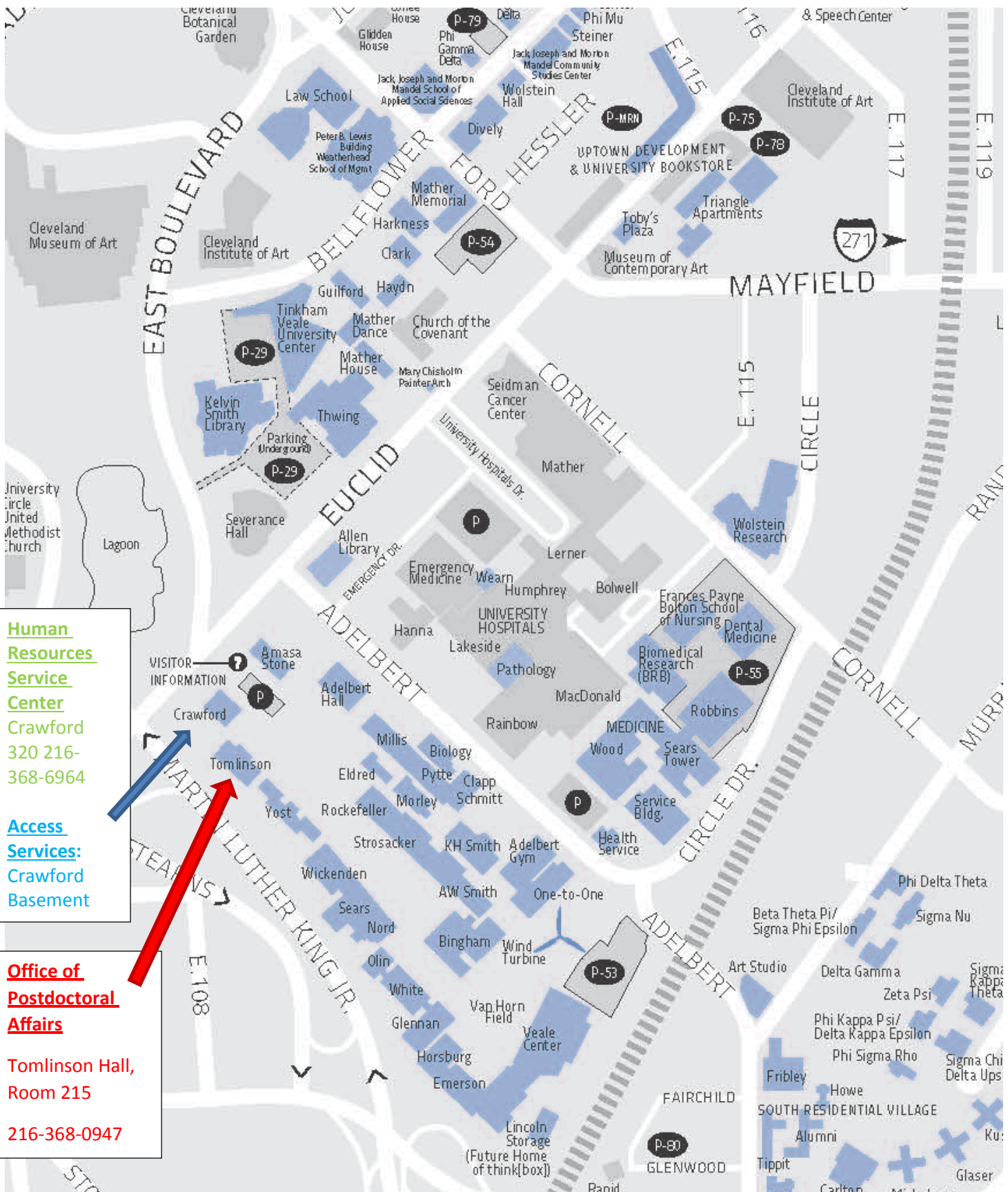
Each year postdocs will receive up to 10 paid sick days to be used for both personal and family medical purposes. A postdoc may draw upon the allowance either intermittently or in total over the twelve-month period based on eligibility date. "Eligibility date" refers to the date of the postdoc's first FMLA leave (Postdoc Scholar's only) within the previous twelve months.

Postdocs use the same allowance for both intermittent leave requests (such as prescheduled time off for medical appointments or reduced work time), if it relates to the personal medical or family medical leave request, or more significant events requiring a leave such as a serious health condition of a family member or a serious health condition of the postdoc.

Sick days for Family Medical, Parenting, and Personal Medical reasons is allowed based on years of service. A postdoc may accrue unused balances from year to year. Postdocs may draw from their sick days balance up to a maximum of 12 weeks within any twelve month time period for personal medical leaves.

Postdocs have the option to use up to eight days annually of their unused paid sick days for bereavement, parenting, or family medical leave. Documentation may be requested for absences exceeding five (5) consecutive days.





SCHOOL OF  
GRADUATE STUDIES  
**CASE WESTERN RESERVE**  
UNIVERSITY

Office of Postdoctoral  
Affairs  
**Campus Map**

# FREE MEMBERSHIP IN THE



## FOR CWRU POSTDOCS

Case Western Reserve University has purchased a sustaining membership from the National Postdoctoral Association (NPA). This entitles everyone who is affiliated with Case to obtain a **free affiliate membership** in the NPA. This is a significant new benefit for postdocs and other individuals affiliated with Case.

### Eligibility

This offer includes postdocs, administrators, graduate students, faculty and alumni. In effect, anyone who has an e-mail address with the domains @case.edu, @cwru.edu, or @po.cwru.edu can join the NPA for free. All you need to do is complete an online or paper enrollment form using your CWRU e-mail address that we have pre-approved.

### Benefits

Affiliate members receive a modified package of benefits, including subscriptions to NPA publications, access to members-only web content, and eligibility for NPA committee service. Please note that affiliate members are not eligible to vote or serve on the NPA Board of Directors.

### Enrollment

The affiliate member enrollment form may be found online at:

<http://www.nationalpostdoc.org/>

### Questions?

Questions about this new benefit may be directed to:

[membership@nationalpostdoc.org](mailto:membership@nationalpostdoc.org)