Postdoc Checklist for Externally Funded Postdocs

☐ **CHECK-IN WITH YOUR FACULTY MENTOR WHEN YOU ARRIVE ON CAMPUS**

☐ **CHECK-IN WITH YOUR DEPARTMENT ADMINISTRATOR WHEN YOU ARRIVE ON CAMPUS**
Your department should cover the following with you:
- 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.

☐ **ATTEND THE POSTDOC BENEFITS REVIEW**
The Office of Postdoctoral Affairs holds weekly Benefits Reviews either one-on-one or as a small group of incoming postdocs. You should have received an email to sign up for a meeting. During the Benefits Review, the Office of Postdoctoral Affairs will review the medical, dental, vision, life insurance, and Employee Assistant Program in depth, go over rates and coverage, and show you how to enroll. If you need to schedule your Benefits Review, email postdoc@case.edu\

☐ **THE POSTDOCTORAL BENEFITS PROGRAM– Enroll AFTER you have your Benefits Review Meeting**
You must enroll in or waive coverage within 30 days of your start date. The following two actions must be completed:
  - Click Begin Enrollment on the left side of the Gallagher Benefits Services portal. Fill out the Enrollment Form.
    - For the Social Security Number (SSN), use your 7-digit CWRU ID instead.
    - 'Department Contact' is your department assistant, not your PI.
    - You do not need to fill in the Billing Information.
    - You do not need to fill in section 3.
    - In section 4, you must choose the HNO or POS plan.
    - In section 5, add yourself and/or family members
  - Fill out the Life Insurance Beneficiary Designation form and scan it to the Postdoc Office at postdoc@case.edu
- To view the Open Enrollment Guide with the benefits information, navigate to the right side of the Gallagher Benefits Services portal and click View Open Enrollment Guide.
- Single coverage in the postdoc benefits program for Postdoctoral Scholars & Fellows is paid by the fellowship/grant or your faculty advisor/department. There are no out-of-pocket monthly premium costs for postdocs with single coverage.
- Your benefits begin on your official first day of employment (the day you sign the I-9 form).
- Research Associates changing to postdocs, your benefits change and are completely different from the staff coverage, you must enroll or waive postdoc benefits.
- If you have any questions about the benefits program, contact Gallagher Benefits Services at 949-317-5917 or universityservices.gbs.casepbp@ajg.com
- **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, please contact Gallagher Benefits Services at 949-317-5917 or universityservices.gbs.casepbp@ajg.com

☐ **ATTEND POSTDOC ORIENTATION**

You should have been emailed information by the Office of Postdoctoral Affairs to RSVP for Postdoc Orientation. Orientation is held on the first Thursday of every month, meaning it could be close to your start date or could be a few weeks later. For more information on your Orientation, email postdoc@case.edu

☐ **CWRU NETWORK ID AND EMAIL ACCOUNT SETUP (for postdocs not paid through CWRU)**

- Since you do not receive a CWRU paycheck, your information is not entered into the HCM system by Human Resources. Therefore, a CWRU network ID and email account is not automatically created for you. Your supervisor or department administrator will need to request an affiliate account for you. To request an affiliate account, your supervisor/administrator should go to https://its-services.case.edu/my-case-identity/affiliates/request/ and log in with his/her CWRU ID and password. They will fill out the form and will receive an email when the account has been assigned. "Post-Doctoral Fellow/Scholar" must be selected in the "Affiliation" field in order to receive all of the postdoc computer privileges and software center access.

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

You must work with your department/lab, through the Department of Environmental Health and Safety (EHS), 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.

- EHS provides training for: OSHA Lab Standards, Bloodborne Pathogens, Respirator, Hazard Communication, Vehicle Safety, X-Ray, Laser, and Radiation Training. To schedule training, contact the department at 368-2907. Check out their Training website.
- 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 at 216-368-5872 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.

☐ **LIBRARY PRIVILEGES**

Library privileges are extended to you when you are a Post-Doc working on a Case research project. Frequently, your status is unknown to the Case Libraries if you are externally funded, or if you are no longer enrolled or employed at Case.

You can enjoy borrowing and research privileges to support your project, once library staff create an updated library account for you. With a library account, you'll have access to the collections at all campus libraries, as well as the collections of OhioLINK member institutions.

- To create your account, we'll enter general contact and sponsoring department information into our online system. We can help you get started with information about the Case libraries, services, and resources for your research!
- **Request An Account:** Requests for Post-Doc library accounts are generally completed within 24 hours or less, weekdays. Staff will create your account M-F during regular business hours and will confirm your account & library privileges with an email message. http://library.case.edu/ksl/services/libraryservices/postdoc.html

☐ **OBTAIN A CWRU I.D. CARD AND PARKING PERMIT**
The HR Service Center will provide you with an I.D./Parking authorization form once all paperwork is completed. Please take your appointment letter to Access Services (located on the ground level of Crawford Hall) to get your I.D. and purchase a parking tag (if applicable).

☐ **ENSURE YOUR APPOINTMENT LETTER IS UP-TO-DATE**
If you appointment data has changed or been pushed back, make sure you receive an updated appointment letter from the Office of Postdoctoral Affairs with the most recent changes.

☐ **DUO SECURITY & HUMAN CAPITAL MANAGEMENT SYSTEM (HCM)**
Please set up Duo Security: Two-Factor Authentication – instructions/training videos on the UTech website. Duo Security is required in order to access CWRU sites like Human Capital Management system (HCM) used by Human Resources - where you can set up your Direct Deposit for paychecks and where you can see/print your paycheck stubs.
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
- Access your on-line paycheck:
  https://www.case.edu/projects/erp/learning/qrg/PayrollInformation_02-10.pdf
- Pay Days: Postdocs are paid monthly, on the last working day of the month. *Depending on your start date and whether or not you have a Social Security Number – postdoc's first paycheck may be delayed by a month (or longer). Please plan to have sufficient funds to get your housing/food/transportation/expenses for your first two months to avoid problems.*

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

☐ **GET TO KNOW THE POSTDOC WEBSITE**
Familiarize yourself with the postdoc website: **http://postdoc.case.edu/** The website will provide helpful information about some of the following items:
- Nearby cities to live in, rental agencies, things to look for when renting, and how to get around the city.
- Setting up a bank account and getting your Social Security Number (SSN).
- Family Resources like childcare, local schools, the Paid Parental Leave Policy.
- Your Postdoctoral Benefits Portal.
- Policies - Paid Parental Leave, Sick/Vacation Time, Unsatisfactory Performance/Corrective Action, Teaching by Postdocs, and the Annual Review Policy
- Information for international postdocs.
- Professional Development.
- The Annual Review process.
- The National Postdoc Association - which is free for CWRU postdocs to join!
- The CWRU Postdoctoral Association - we encourage you to get involved and have a voice as postdoc leadership, plan events, impact policies, and build your network!

☐ **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
- **Scholarships, Fellowships, Grants & Tuition Reductions:** http://www.irs.gov/publications/p970/ch01.html
- **State Taxes:** Ohio Department of Taxation 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/

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