HIRING GUIDE FOR POSTDOCS

Where are open postdoc positions posted?

Postdoc positions are published on the Academic Careers website at CWRU. Job descriptions can be sent to employment@case.edu to be posted on the website for a minimum of 5 days (standard of 90 days). PIs and departments can also share their job posting with their networks, on their department websites, or social media. There are also various advertising platforms such as the National Postdoc Association, Inside Higher Ed, Higher Ed Jobs, Minority Postdoc, Chronicle of Higher Education, Science, and Nature. Additionally, the Postdoc office can post the listing on their social media pages.

What happens once I recruit a candidate?

Once you recruit, interview, and decide on a final candidate you're interested in hiring, please have the prospective postdoc fill out the **Post Doc Data Form** on the Postdoctoral Affairs website. Be sure they answer "Have you been offered a postdoc position at CWRU? - Yes". This signals to our office that we need to create the EMPLID (unless an EMPLID already exists). The Postdoc Office will send the EMPLID to the department assistant so they can create the appointment request in SIS. The appointment will go through the approval chain and once it reaches the Postdoc Office, we will generate the official appointment letter and email it to the postdoc, PI, department assistant, finance office, VISA office, and Human Resources. *If a visa is required, the department administrator must request the visa through Scholar Portal and work with the VISA office on any required documentation.

Checklist of items needed before entering the postdoc record

The department admin should gather the following information in order to input the record:

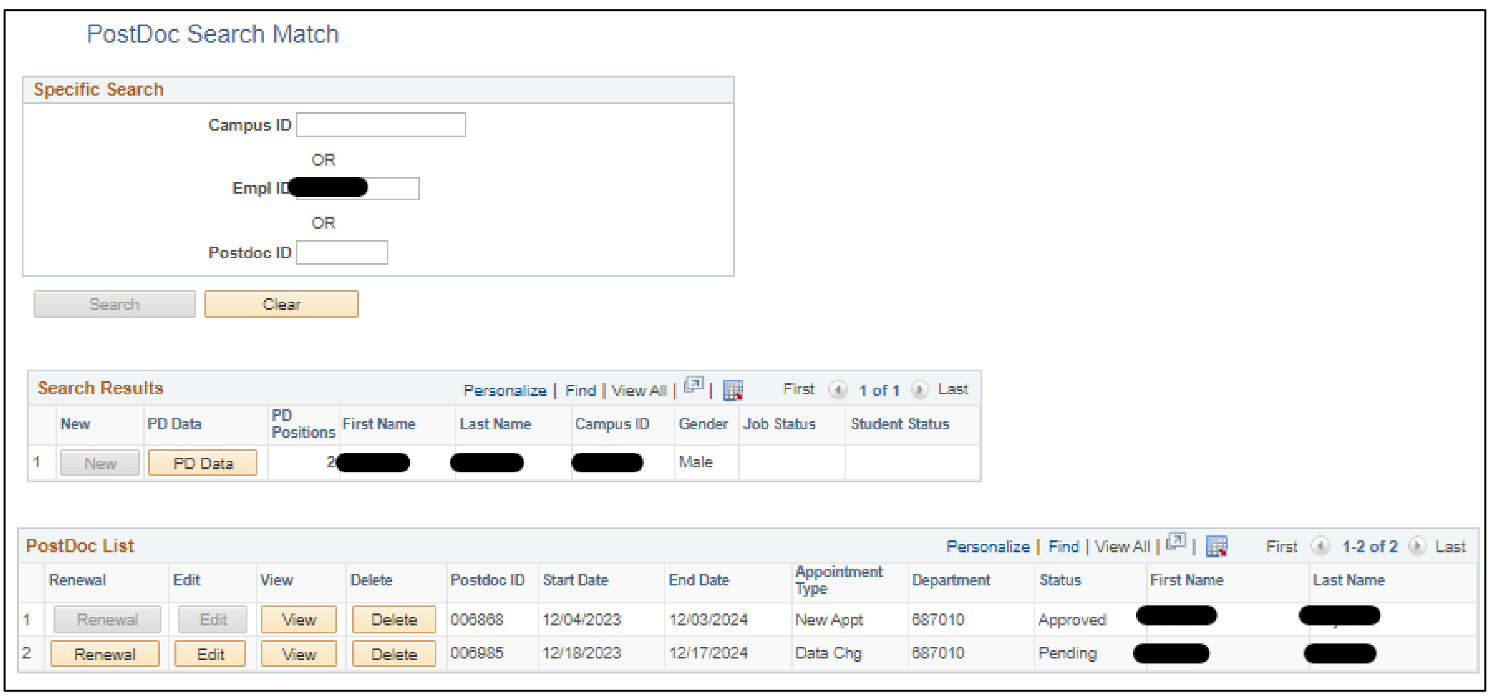
- ☐ Desired Start Date / End Date (preference is ONE YEAR appointments) (make sure you're giving the approval and visa process enough time) (start date cannot be on a holiday or weekend)
- ☐ EMPL ID# of candidate (provided by the Postdoc Office)
- ☐ EMPL ID# of Faculty Mentor
- ☐ Professional Activity: A couple of sentences about the kind of work the candidate will be doing; this will be included in the formal offer letter.
- ☐ Speedtypes/ descriptions of the funding sources for both salary and benefits
- ☐ Benefits level (single, dependent, or family)
- ☐ Are they full or part time?
- ☐ Type of visa they will be requesting (if applicable)
- ☐ Salary (based on year of graduation and experience as a postdoc)
- ☐ Candidate's CV **
- ☐ Candidate's diploma from terminal degree (PhD, MD, JD, etc.) {not Master's} **
- ☐ SOM: Personnel Data Form (PD FORM) or CAS: Expense Statement

**Required attachments for file to save & submit in SIS

How to create a new record in SIS

1. Make sure you have access in SIS to create postdoc records. If you are unsure if you have this access, ask the Postdoc Office if you do or how you can get it.
2. The prospective postdoc should fill out the Postdoc Data Form found on the Postdoc website. Answer 'Yes' to the first question asking if they have been offered a position. The prospective postdoc is required to upload a resume/CV onto the form.
3. Once received, the Data Form and CV are reviewed by the Postdoc office.
4. The Postdoc Office will enter their information into SIS and create a new EMPLID. The EMPLID is then emailed to the department administrator and PI.
5. The department administrator will gather the required documents and information for the appointment and visa process.
6. Once they've gathered all of the documents, the department administrator follows the following instructions in SIS:

    a. Go to sis.case.edu
    b. Enter User ID & Password to log in via Single Sign On
    c. Click "Main Menu"
    d. Click "Campus Community"
    e. Click "Postdoc Search Match"
    f. Enter the EMPL ID number of the postdoc candidate
    g. Click the Search Button
    h. Click the "PD Data" button
    i. Click "Edit" to start a new record (new line of data)
    j. Click OK when asked if you want to create a new PostDocID
    k. Click "Save as Draft" if you need to enter more info later. If/when you go back to the record later, click "View" rather than "Edit."



PostDoc Search Match

Specific Search

Campus ID

OR

Empl ID [redacted]

OR

Postdoc ID

Search Clear

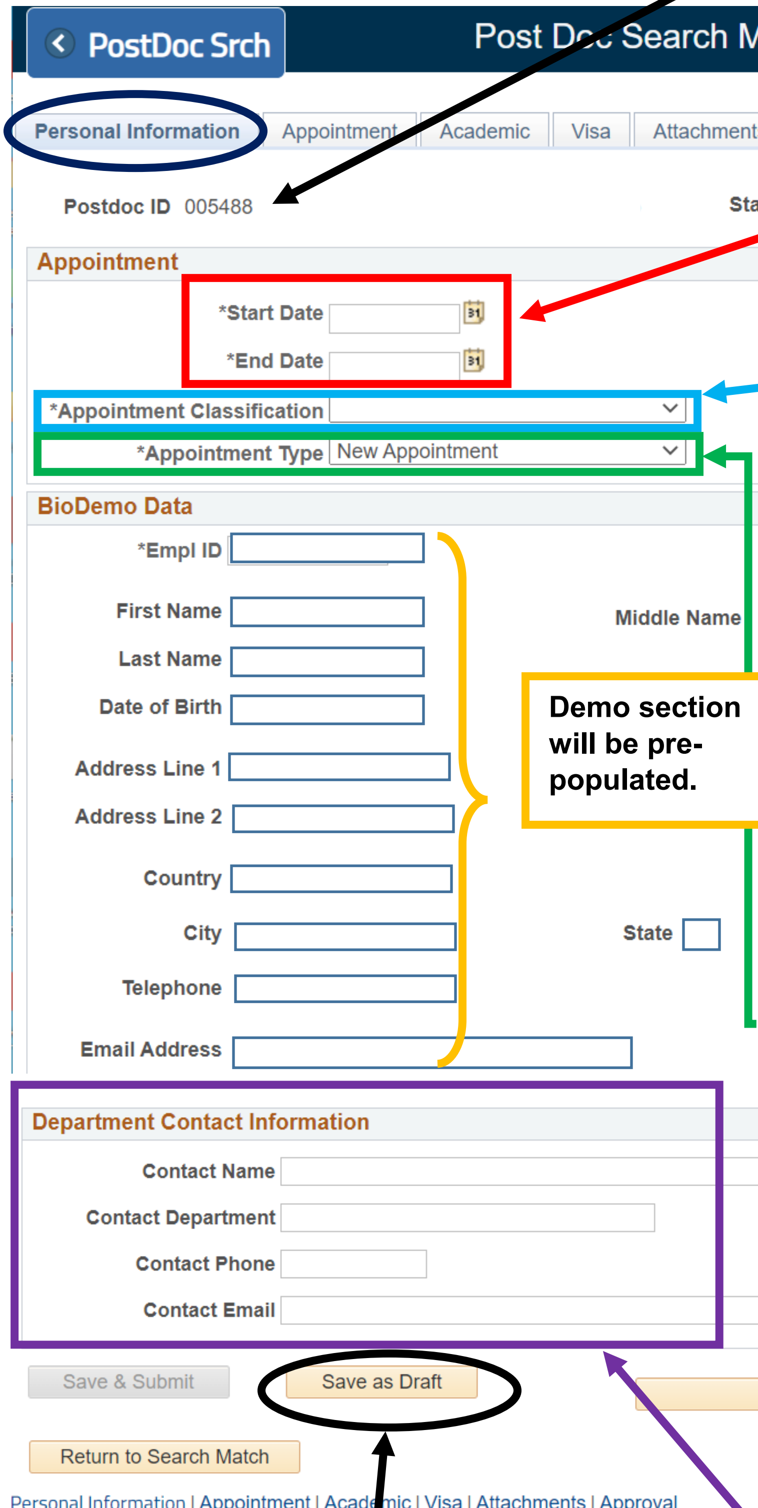
Search Results — Personalize | Find | View All | First 1 of 1 Last

	New	PD Data	PD Positions	First Name	Last Name	Campus ID	Gender	Job Status	Student Status
1	New	PD Data	2	[redacted]	[redacted]	[redacted]	Male		

PostDoc List — Personalize | Find | View All | First 1-2 of 2 Last

	Renewal	Edit	View	Delete	Postdoc ID	Start Date	End Date	Appointment Type	Department	Status	First Name	Last Name
1	Renewal	Edit	View	Delete	006868	12/04/2023	12/03/2024	New Appt	687010	Approved	[redacted]	[redacted]
2	Renewal	Edit	View	Delete	006985	12/18/2023	12/17/2024	Data Chg	687010	Pending	[redacted]	[redacted]

TAB 1 – PERSONAL INFORMATION



Record #

Check dates: Appointment timeframe is typically one calendar year (ex. June 1 - May 31). Not on holiday or weekend. Have you allowed enough processing time?

Appointment classification: Look at the funding codes and sources.

SCHOLAR: Internal funding at CWRU. Res (Research Grant) is a Scholar.

FELLOW: External fellows on grants like T32s (TRN = Training Grant)

Demo section will be pre-populated.

Appointment Type:

New Appointment – brand new postdoc

Appointment Renewal – select for year 2+ of postdoctoral appointments

Data Change – making minor changes to a previously approved record (ex. change of start date or approved salary change)

Transfer/Reclass: Transfer = changing departments within CWRU. Reclass = changing from Scholar to Fellow or vice versa

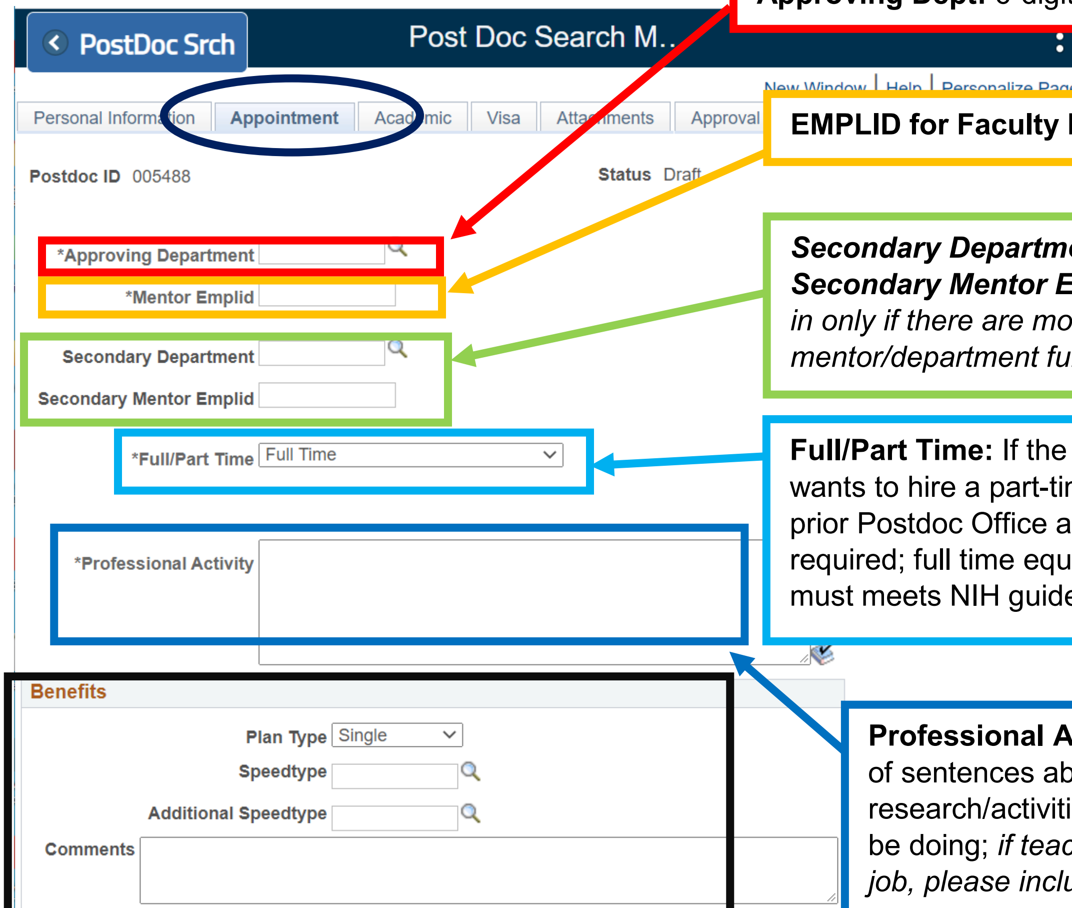
Save as Draft often to avoid loss of any data!

Department Contact Information: who is entering the record (typically department administrator)

TAB 2 – APPOINTMENT INFORMATION (Part 1)

Approving Dept: 6-digit code

EMPLID for Faculty PI



Secondary Department & Secondary Mentor EMPLID: *Fill in only if there are more than one mentor/department funding*

Full/Part Time: If the department wants to hire a part-time postdocs, prior Postdoc Office approval is required; full time equivalent salary must meets NIH guidelines

Professional Activity: A couple of sentences about the kind of research/activities the postdoc will be doing; *if teaching is part of the job, please include it here.*

Benefits

PIs/departments/schools are required to pay 100% of the single rate for postdoc benefits.

Plan Type: What level of benefits is the PI paying for?

- SINGLE (REQUIRED) – system defaults to this level
- DEPENDENT (Postdoc + 1)
- FAMILY (Postdoc plus 2 or more)

Speedtype: Account(s) to which benefits will be charged. RECV accounts cannot be used.

Comments Box: Use this to leave notes for Finance or the Postdoc Office about Benefits and/or Salary information

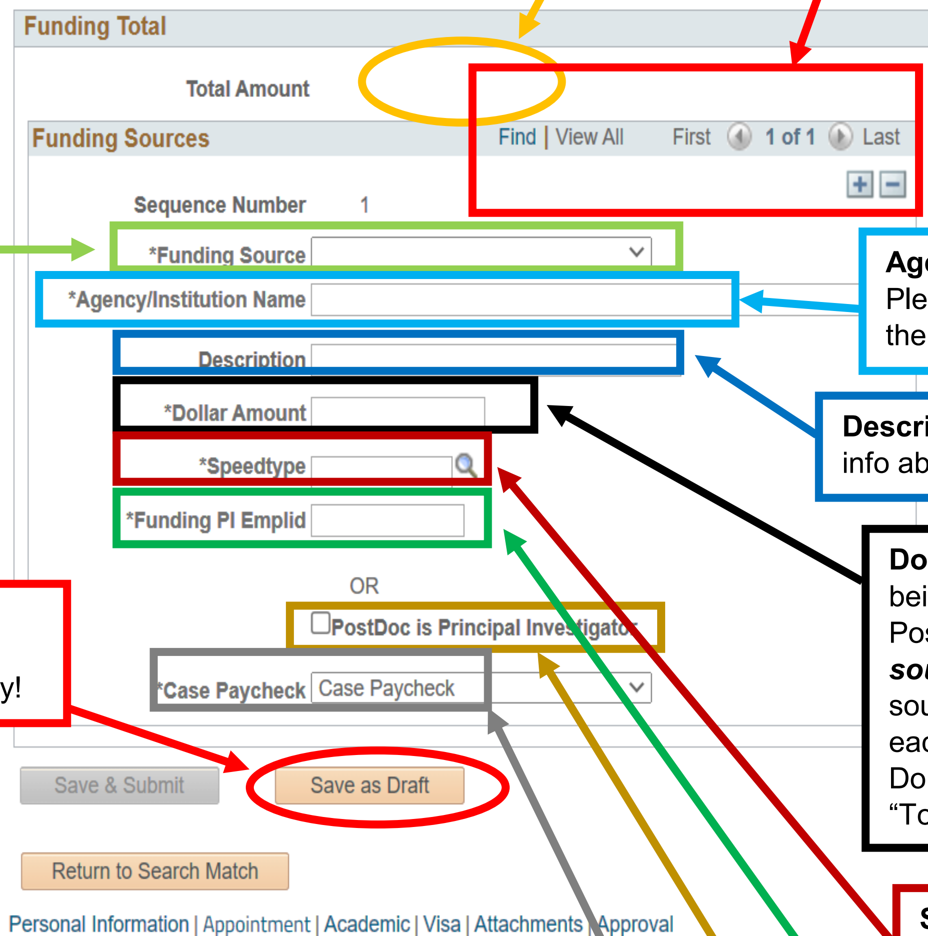
TAB 2 – APPOINTMENT INFORMATION (Part 2)

Funding Source (drop-down menu)

1. DOS Grant
2. Fellowship
3. Foreign Visitor's Government
4. Other Sources
5. Personal Funds (*rare*)
6. Research Grant
7. Total Dept/Case Funding
8. Training Grant
9. Visiting Home Institution

Total Amount: Total *ANNUAL* Salary; sum of the Dollar Amounts listed in all Funding Sources

Funding Sources: Add as many funding sources as necessary; use "+" to add another



Agency/Institution Name: Please spell out the full name of the funding source, no acronyms

Description: more space to add info about the funding source

Dollar Amount: Annual funds being contributed to cover Postdoc's salary ***from this source.*** If there are multiple sources, fill in a separate block for each one; when totaled, all the Dollar Amounts should equal "Total Amount"

Save As Draft frequently!

Speedtype: Use the magnifying glass to look up account number

Funding PI EMPL: typically same as the Mentor above

Case Paycheck: Will the postdoc be receiving a CWRU paycheck? Y/N dropdown menu (typically yes)

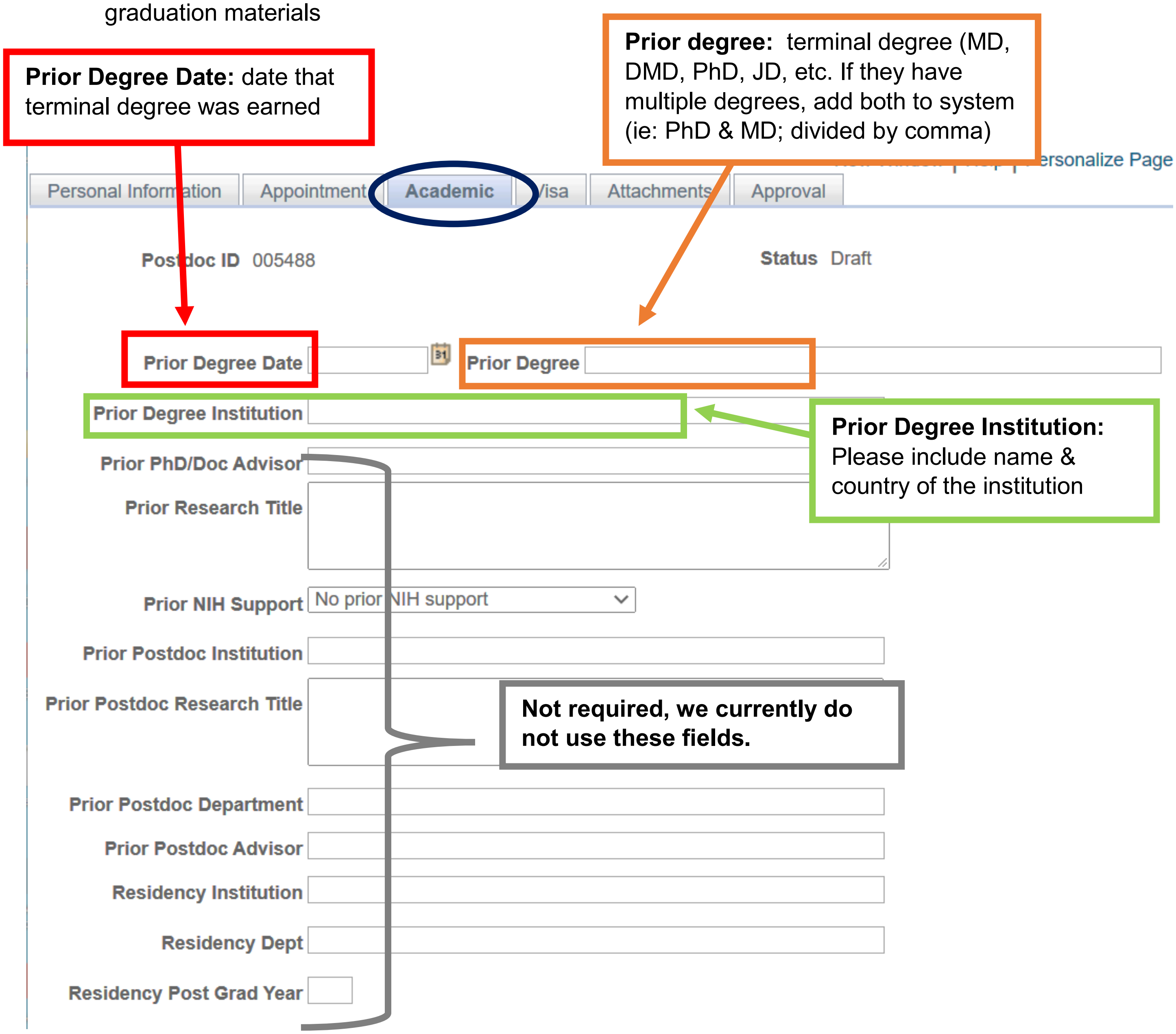
"Postdoc is Principal Investigator": check if Postdoc Fellow has their own grant

TAB 3 – ACADEMIC INFORMATION

Please enter information about the individual's highest degree and previous postdoctoral experience.

- **IF POSTDOC CANDIDATE GRADUATED MORE THAN 5 YEARS AGO – PLEASE CONSIDER WHETHER THEY WOULD BE BETTER SUITED IN ANOTHER RESEARCH JOB CATEGORY (ex. Research Associate, Research Scientist)**

- If candidate is a recent CWRU graduate, please check SIS for degree verification or email the School of Graduate Studies for degree verification or submission of final graduation materials

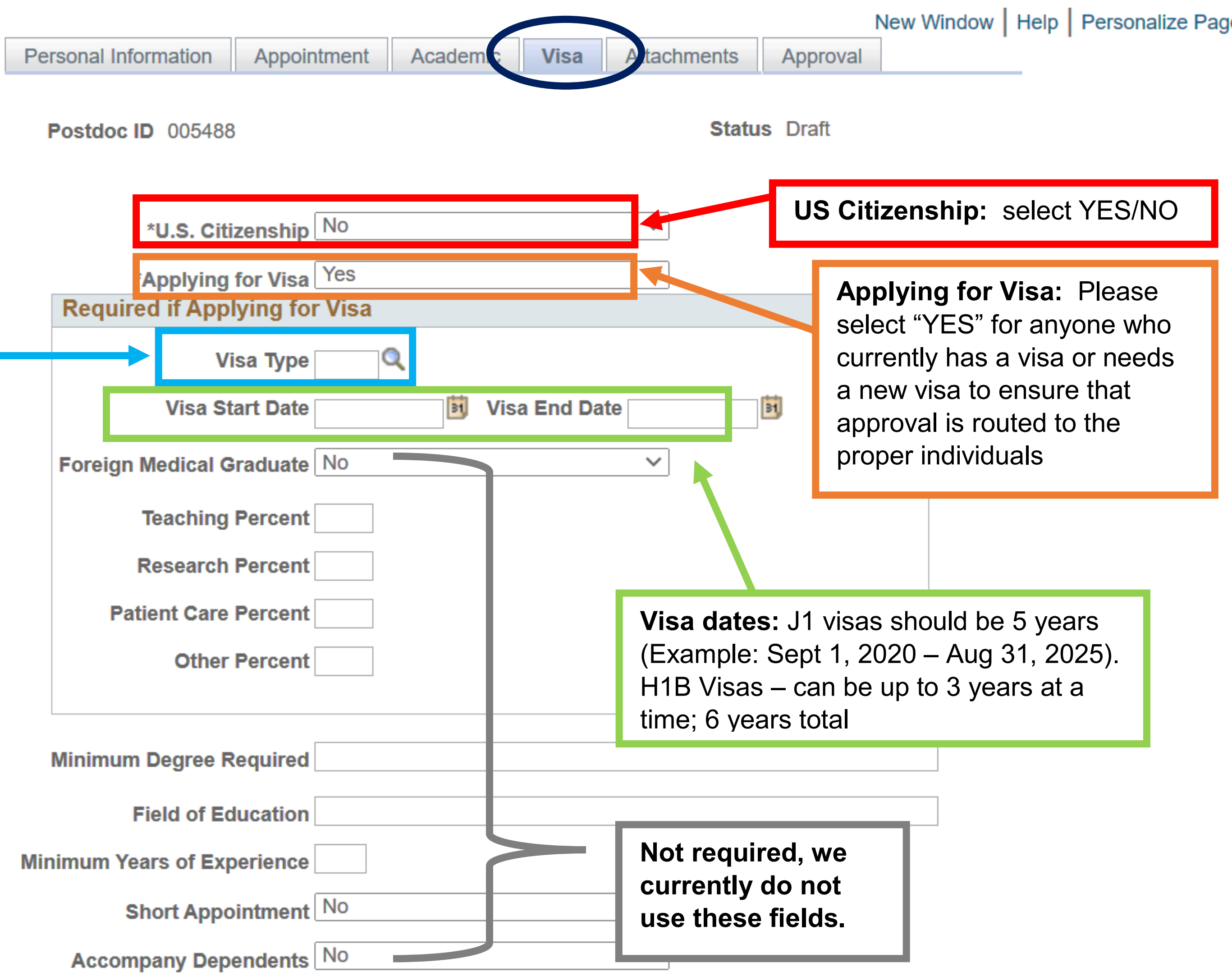


TAB 4 – VISA INFORMATION

- International Postdocs must have valid visa/work permit to be paid by CWRU.
- Department admin must work with the VISA Office and enter the postdoc's information in Scholar Portal (visas.case.edu) if requesting a visa.

Visa Type :

- **EAD I-766 Employment Authorization Document**: work permit that covers multiple kinds of visas (F1 OPT, J2)
- **F1 Visa**: F1 OPT or STEM OPT – extension of a student visa from postdoc's USA home institution
- **H-1B Temp Specialty Occupation**: Temporary Workers with Specialty Occupations
- **J1 Visa:** Exchange Visitors
- **J2 Visa:** J-2 Dependents of J1visa holder
- **O1:** Extraordinary Ability
- **OTH**: Other, Non-Student
- **TN**: TN Canadian/Mexican Business; Trade NAFTA Visa – for citizens of Canada or Mexico only



US Citizenship: select YES/NO

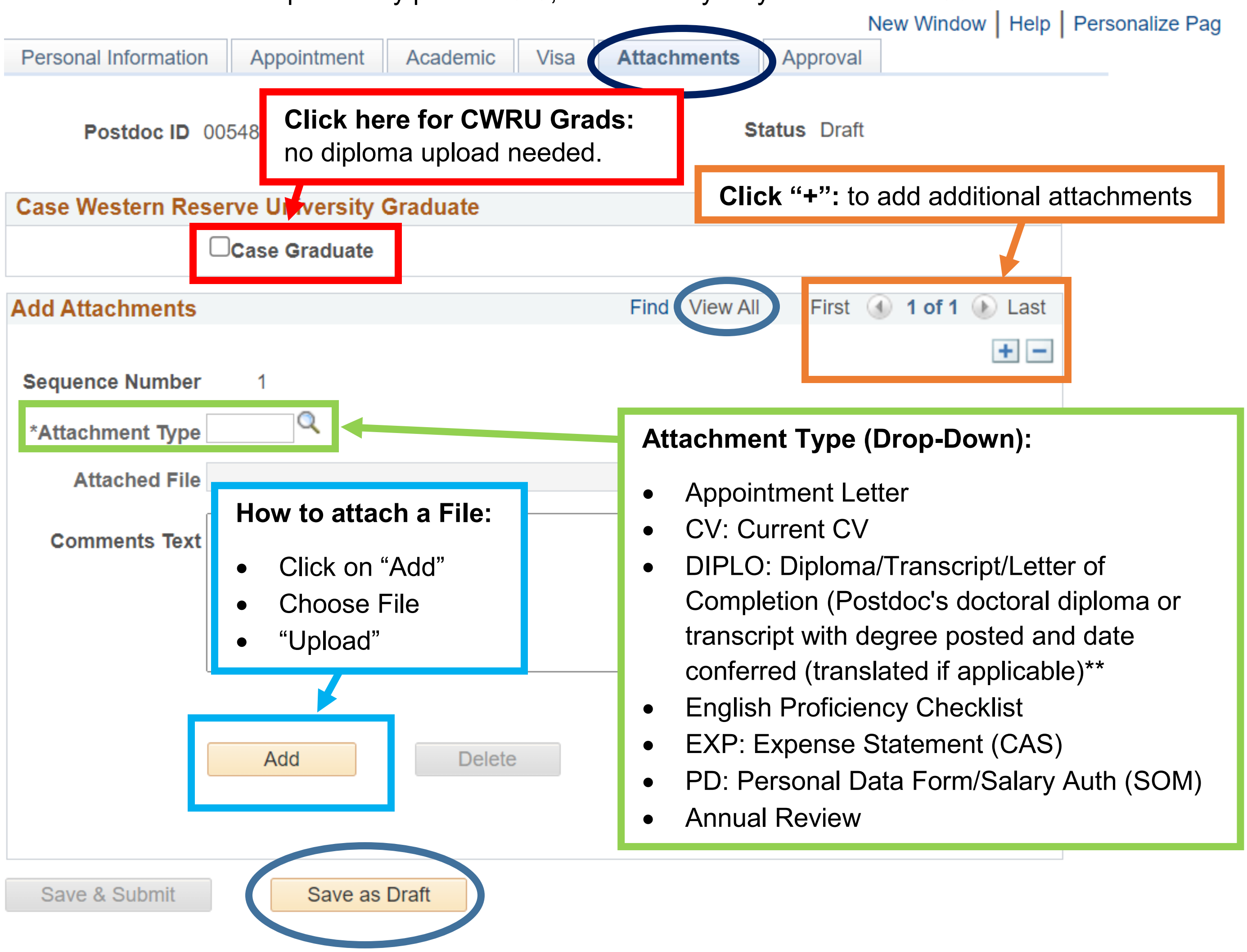
Applying for Visa: Please select "YES" for anyone who currently has a visa or needs a new visa to ensure that approval is routed to the proper individuals

Visa dates: J1 visas should be 5 years (Example: Sept 1, 2020 – Aug 31, 2025). H1B Visas – can be up to 3 years at a time; 6 years total

Not required, we currently do not use these fields.

TAB 5 – ATTACHMENTS

- ***SIS requires something to be coded at DIPL (diploma) and CV. If it doesn't see those two attachment types, it will not allow you to submit the record.***
- If the person has not graduated yet, a letter of completion will be required.
- ***Letter of Completion must include that the candidate has completed all degree requirements, including successful defense, and the anticipated graduation date. We cannot send an offer letter until after they have successfully defended.***
- Visa forms were previously put into SIS, but now they only need to be in Scholar Portal.



TAB 6 – APPROVAL

- Administrator should click “Save and Submit” on the Appointment Tab and then must “Approve” on the Approval Tab. This will send the record to the next person on the approval chain.

- Typical approval chain:

  1. Department Administrator
  2. Chair (sometimes)
  3. Finance Office / Dean’s Office
  4. Postdoc Office
  5. VISA office (for visa holders)

- **If record needs to be expedited: please call others in the approval chain; do not simply leave a note in the SIS record, as it may not be seen quickly.**

Data Changes

If a postdoc needs to adjust (usually push back) their start date, a new record should be created in SIS to reflect that change. Data changes alternatively can be done if there is an adjustment to the salary or anything else in the record.

1. In SIS, just as when you created the initial postdoc record by clicking Edit, do the same to create a new data change record. On the Appointment tab, change the Appointment Type to Data Change
2. On the Approval tab, make a note of the change so all approvers are aware of why a new record was created and needs approval.
3. Save and Submit. The Data Change will go back through the approvers again. Once it hits the Postdoc Office, a revised letter will be sent to the postdoc (if applicable).

** If a department admin simply needs to upload a new document or change something minor, they can send it to the Postdoc Office to make the change behind the scenes without creating a new record.*