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.

Postdoctoral Scholars Hiring Process

The following steps create a clear, consistent, and compliant postdoctoral hiring process across Case Western Reserve University.

Step 1

A postdoctoral scholar ad is created by the Principal Investigator (“PI”) or hiring mentor, with department administrator assistance as needed, and submitted to academiccareers@case.edu for compliance review and posting. (Job posting templates will be made available to aid in this process.) Job postings should include elements that are essential to the position such as scientific or other areas of research or methods relevant to the position, and terminal degree requirements. Diversity statements must not be requested for any position. Applicants are requested to submit their CV with list of publications, contact information, and references if requested are submitted directly to the PI or mentor.

Step 2

The PI or mentor must complete the Postdoctoral Hiring training which provides guidance on the University’s non-discriminatory hiring practices. The training is provided asynchronously on Canvas. **Enroll in the course here.**

Step 3

After at least five days from the initial date of posting, the PI or mentor can begin to review applicants for the position to identify potential qualified candidates, taking into consideration only job-related criteria. The PI or mentor may, but is not required to, develop a rubric for evaluating all candidates, consistent with the legitimate, non-discriminatory selection criteria. Any written rubrics must be reviewed and approved by the Office of General Counsel by submitting it to ogcsearches@case.edu.

Step 4

The PI or mentor interviews qualified candidates either in-person or via Zoom. Best practices recommend interviewing more than one candidate, at least two to three depending on the number of candidates whose materials indicate they meet minimum job requirements, to provide a more comprehensive review of qualified candidates. PIs and mentors are encouraged to bring postdoctoral scholar candidates to campus for in-person interviews when feasible. In such situations, it is recommended to show candidates the workspace and introduce them to other members of the research team, if applicable.

Step 5

Once the top qualified candidate has been identified by the PI or mentor based on legitimate, nondiscriminatory selection criteria, the candidate should be requested to fill out the Post Doc Data form which will start the appointment approval process. Once the Post Doc Data form is completed, the Office of Faculty Advancement and Postdoctoral Affairs will create a Student Information System ("SIS") entry to be used for the appointment approval process.

Step 6

The Department Administrator for the department in which the postdoc will be appointed completes the required appointment record in SIS.

Step 7

Once the appointment request is generated by the department in SIS, the Finance Officer for the School or College in which the postdoc will be appointed will review the request, confirm adequate funding, and approve the appointment request.

Step 8

Once approved at the School or College level, the appointment request is forwarded to the Office of Faculty Advancement and Postdoctoral Affairs who will confirm the candidate's credentials and eligibility for appointment.

Step 9

If the PI or mentor posted the position as one eligible for visa sponsorship and the selected candidate needs a visa and/or work authorization to engage in work at the university the appointment request must go to the HR - VISA Office for approval.

Step 10

Once all required approvals are complete, the Office of Faculty Advancement and Postdoctoral Affairs will issue the appointment letter to the selected candidate.

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

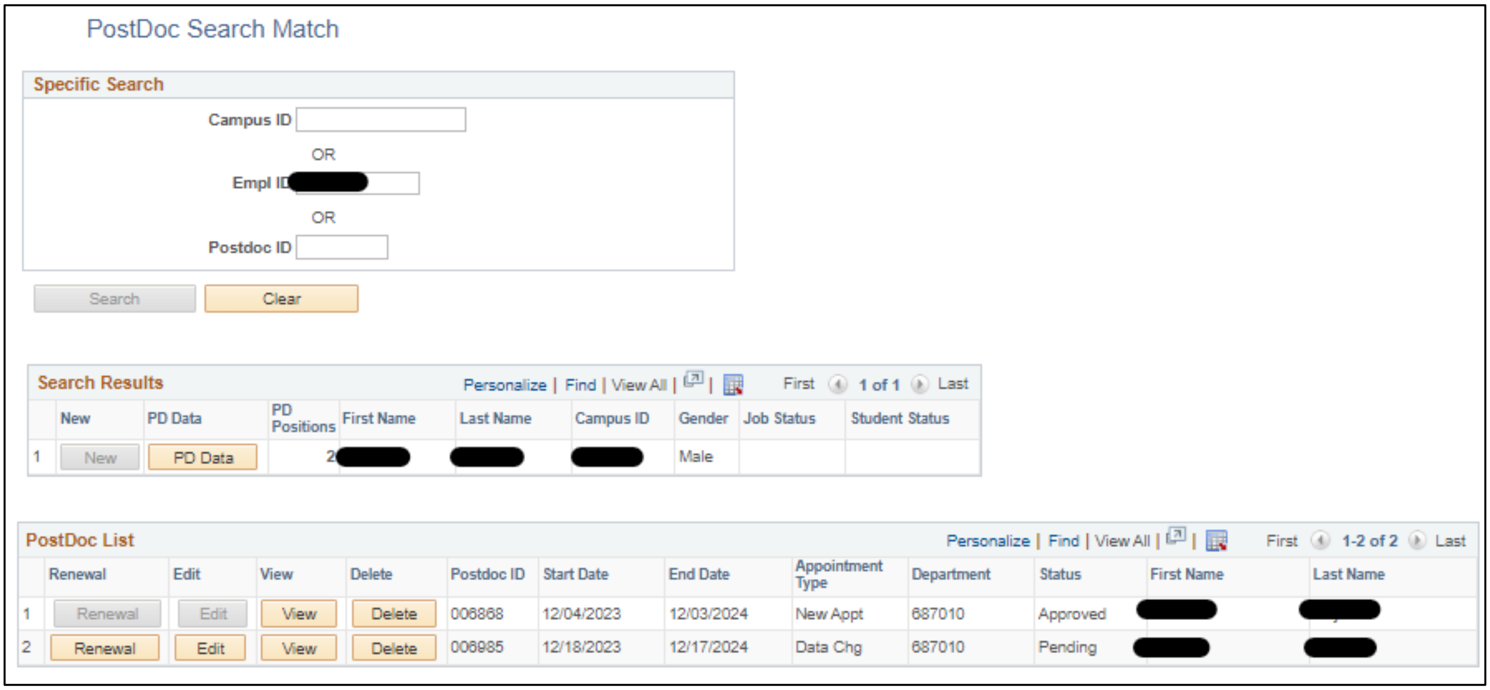
**Required attachments for file to save & submit in SIS

How to create a new record in SIS

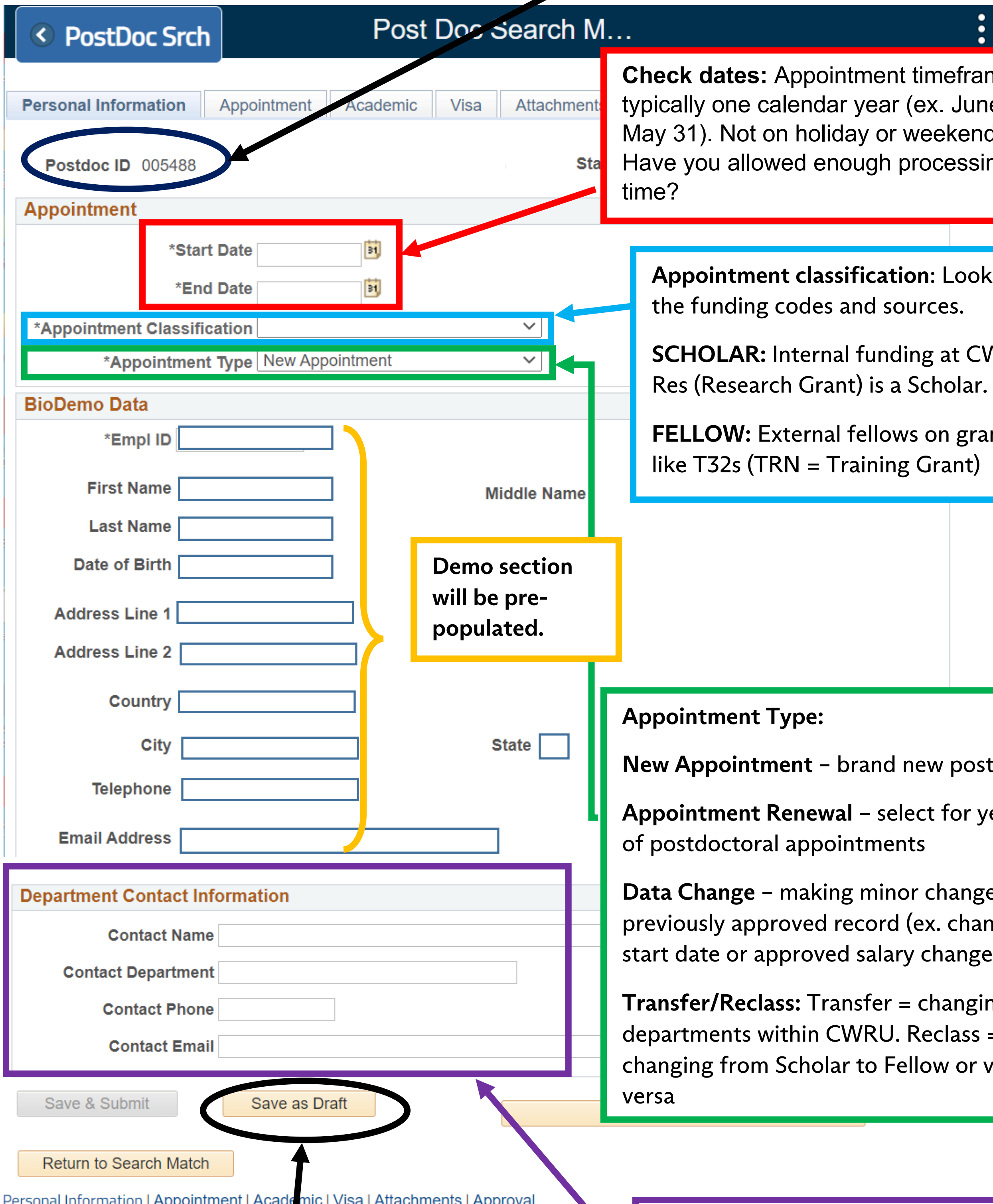
1. Make sure you have access in SIS to create postdoc records. If you are unsure if you have this access, ask the Postdoc Office if you do or how you can get it.
2. The prospective postdoc should fill out the Postdoc Data Form found on the Postdoc website. Answer 'Yes' to the first question asking if 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.”



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

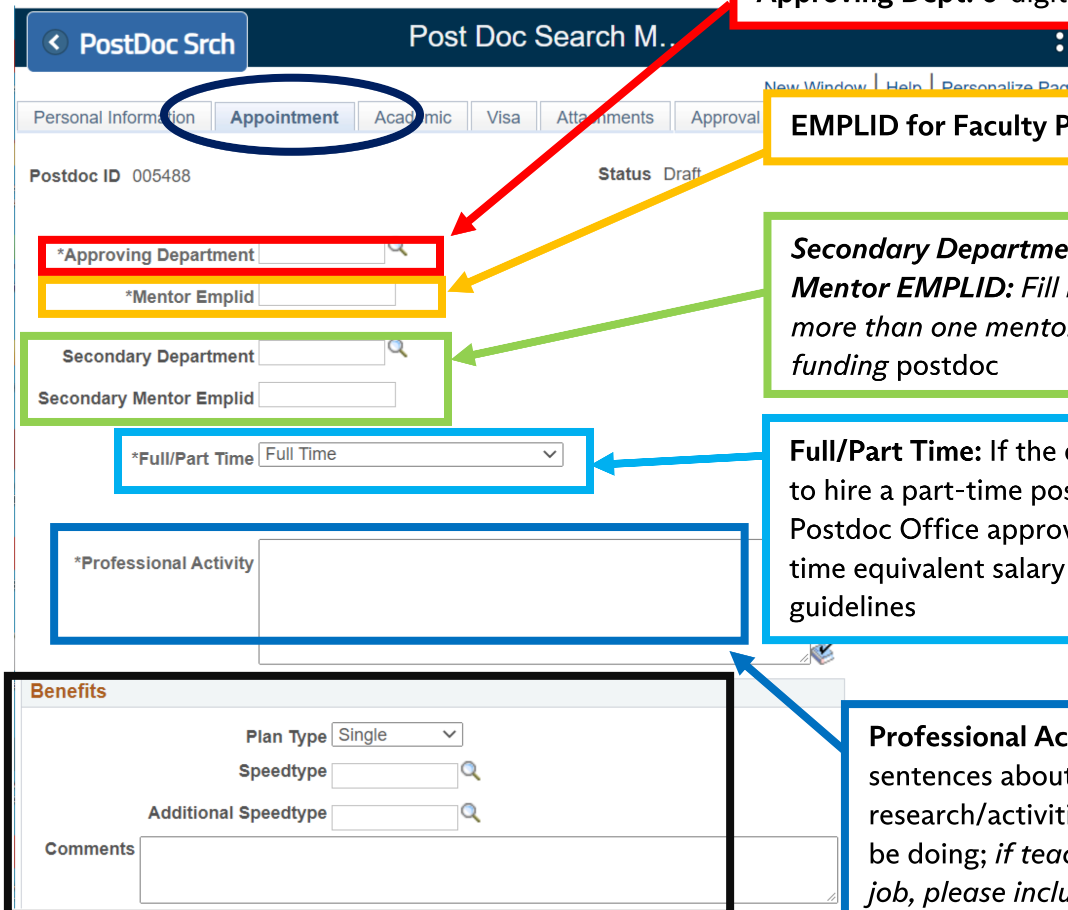
Data Change – making minor changes to a previously approved record (ex. change of start date or approved salary change)

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

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

Save as Draft often to avoid loss of any data!

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* postdoc

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

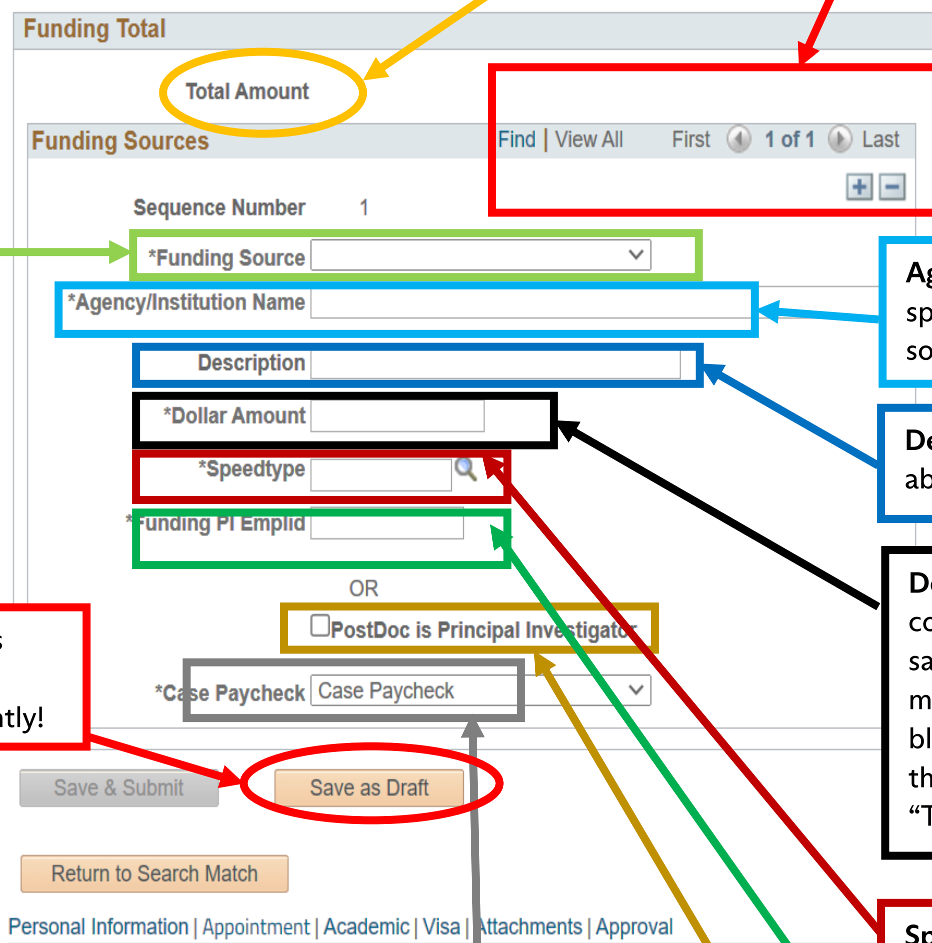
TAB 2 – APPOINTMENT INFORMATION (Part 2)

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)

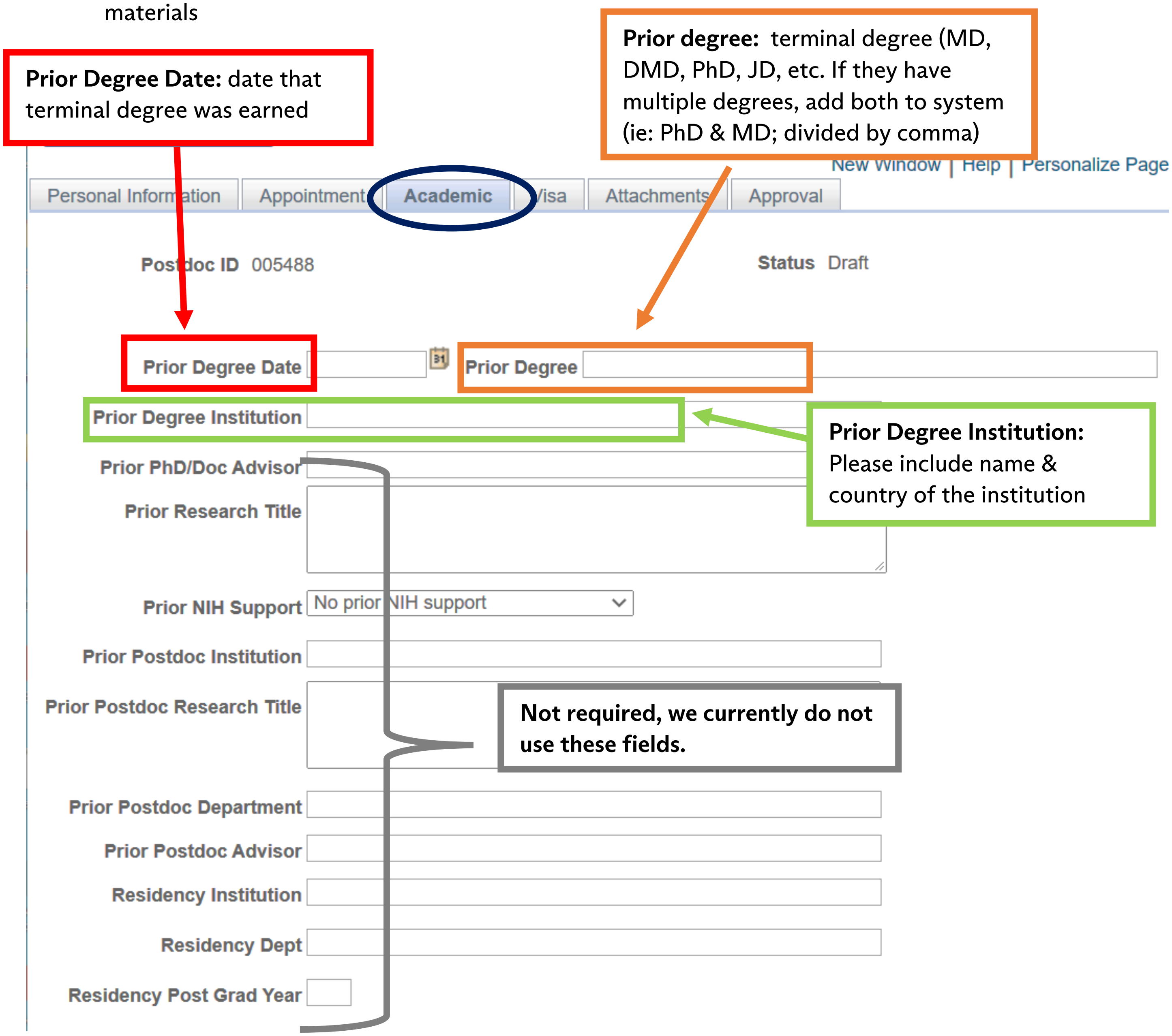
"Postdoc is Principal Investigator": check if Postdoc Fellow has their own grant

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

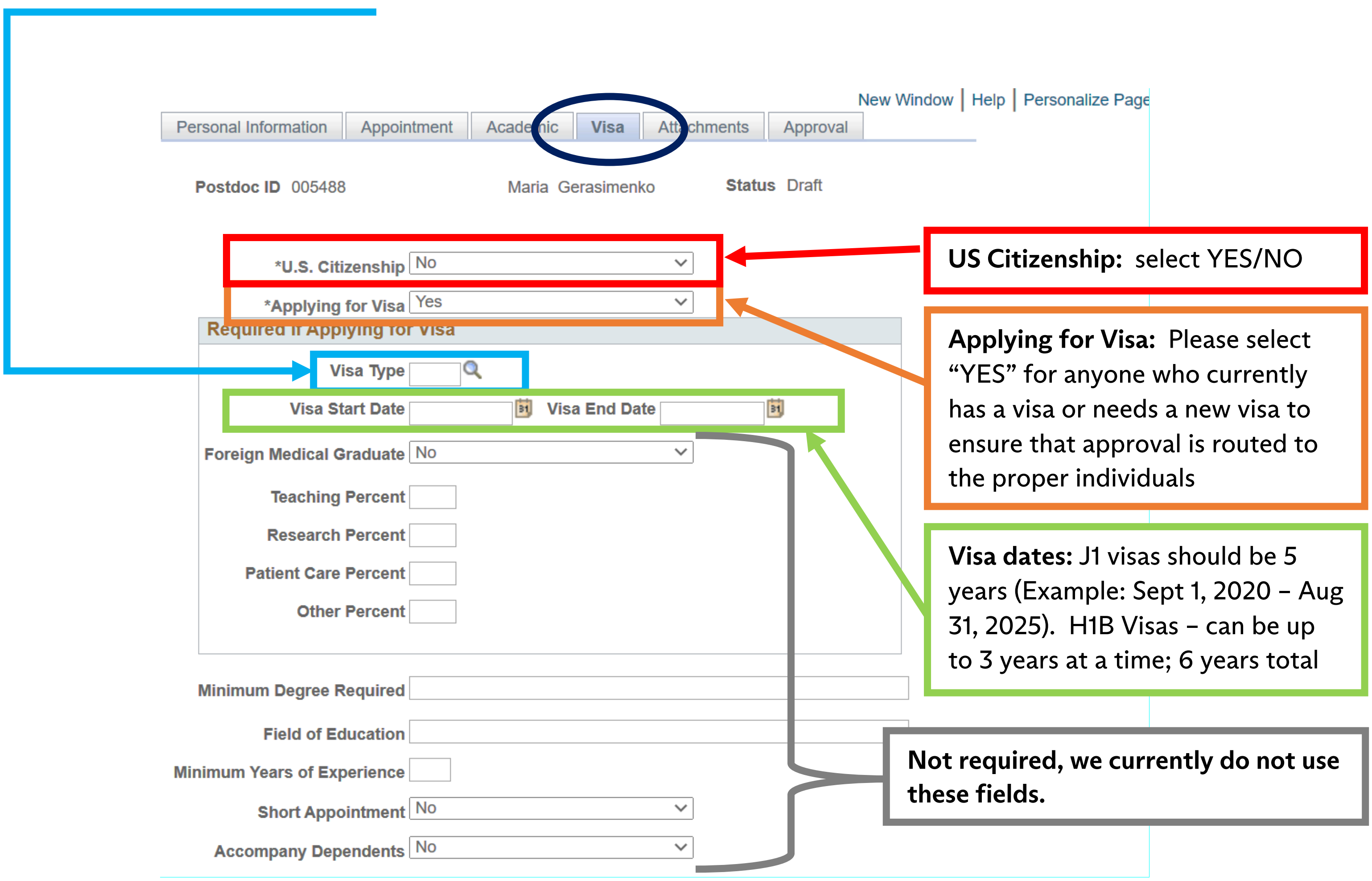


TAB 4 – VISA INFORMATION

- 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.

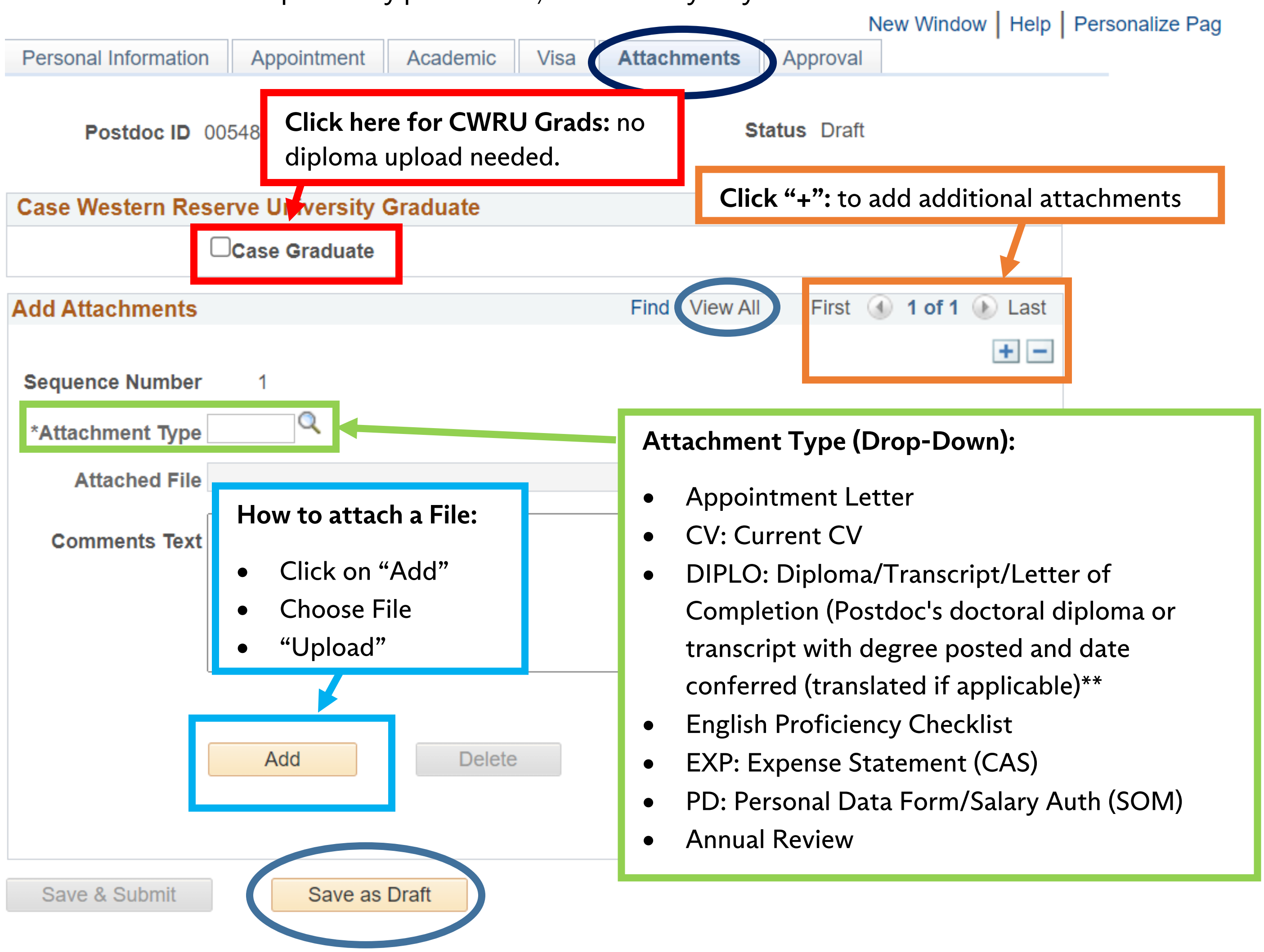
Visa Type :

- **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



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.



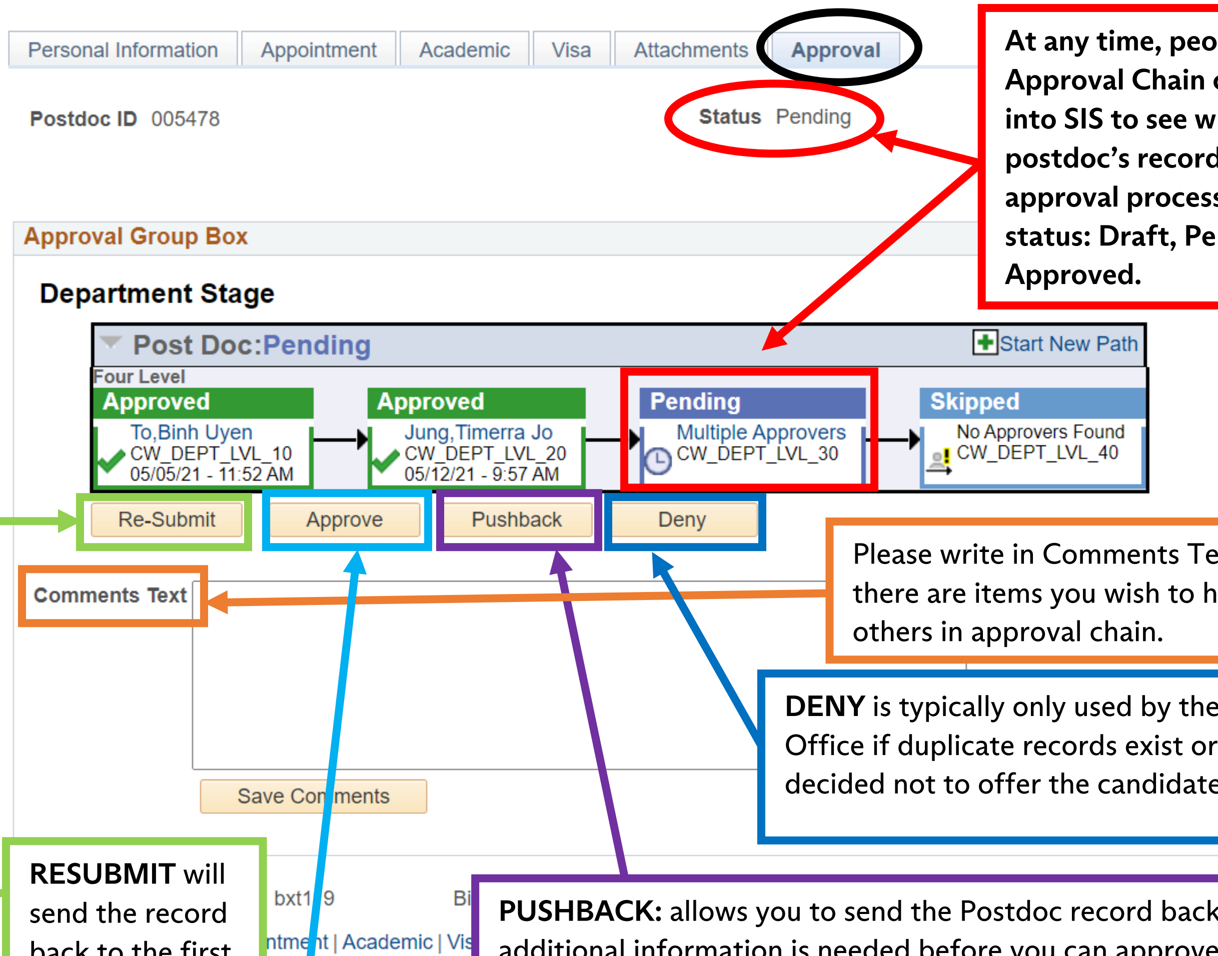
TAB 6 – APPROVAL

- 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.**



At any time, people on the Approval Chain can log into SIS to see where the postdoc’s record is in the approval process, and its status: Draft, Pending, or Approved.

Please write in Comments Text Box if there are items you wish to highlight for others in approval chain.

DENY is typically only used by the Postdoc Office if duplicate records exist or if we have decided not to offer the candidate a job.

RESUBMIT will send the record back to the first person in the approval chain.

APPROVE will send the record to the next person in the approval chain.

PUSHBACK: allows you to send the Postdoc record back one level if additional information is needed before you can approve the record. For efficiency, you can add comments on the page, save the comments, then "Push Back" the record.

If you receive a pushed-back record, you will receive a notification email that a Postdoc record requires your attention and the record will appear in your worklist. You can review the comments, make the necessary changes, then select "Approve" to push the record forward in the approval chain.

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.*