CASE WESTERN RESERVE
UNIVERSITY
**Faculty Advancement
and Postdoctoral Affairs**

NEW POSTDOC CHECKLIST

☐ **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:
- 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 ID card and set up getting keys if necessary.

☐ **VIEW THE POSTDOC BENEFITS REVIEW**
The Office of Faculty Advancement and Postdoctoral Affairs benefits review video can be found at Postdoc Benefits Review. This video provides an overview of the medical, dental, vision, and life insurance. It also goes over the Employee Assistant Program in depth, reviews rates and coverage, and shows you how to enroll.

☐ **ENSURE YOUR APPOINTMENT LETTER IS UP TO DATE**
If your 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.

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

- **FOREIGN POSTDOCS:** Schedule an appointment to check in with the VISA Office in Crawford Hall, room 320 **no later than the start date** listed in your appointment letter. **Please refer to emails that were sent to you with instructions on how to make an appointment and documents that you should bring.** The VISA 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.
- **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 appointment letter and your acceptable I-9 documents**. See the attached list on page 5 for what are 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*. [1]

- 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.**

☐ **ATTEND POSTDOC ORIENTATION**

You should have been emailed information by the Office of Faculty Advancement and 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

☐ **OBTAIN A CWRU I.D. CARD, PARKING PERMIT, OR BUSS PASS**

The HR Service Center will provide you with a 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 or RTA bus pass (if applicable).

☐ **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 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 or contact the Help Desk at 368-HELP (x4357).
- **FOREIGN POSTDOCS** (that do not have a social security number yet): You will typically need to wait until you have your SSN to have your network ID and email created. Either wait or contact the ITS department by emailing network-id@case.edu. They can create a temporary ID number for you to get your network account up and running until you get your social security number (SSN). Once you receive your SSN, please contact network-id@case.edu so that your record can be updated.

☐ **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. HCM is where you can set up your Direct Deposit for paychecks, where you can see/print your paycheck stubs, and 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 on the Payroll Assistance link: http://www.case.edu/finadmin/controller/pdf/HCM_DirectDeposit_guide.pdf

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[1] *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 appointment letter, all applicable paperwork, and your social security number. International postdocs may not be paid until they receive their SSN card in the mail - please be aware this could delay your first paycheck and plan accordingly.*

- 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 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.

☐ **THE POSTDOCTORAL BENEFITS PROGRAM– Enroll <u>AFTER</u> you have completed the** Postdoc Benefits Review*. 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.
    - o For the Social Security Number (SSN), if you do not yet have the SSN, use your 7-digit CWRU ID instead.
    - o 'Department Contact' is your department assistant, not your PI. o You do not need to fill in the Billing Information.
    - o You do not need to fill in section 3 unless you are adding a Domestic Partner
    - o In section 4, you must choose the HNO or POS plan.
    - o 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 hrrecords@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).
- If you have any questions about the benefits program, contact Gallagher Benefits Services at 949-3175917 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 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, then 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.

☐ **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
- Getting your Social Security Number (SSN)
- Family Resources like childcare, local schools, the Paid Parental Leave Policy
- Your Postdoctoral Benefits Portal AND Health Resources
- Policies - Paid Parental Leave, Sick/Vacation Time, Unsatisfactory Performance/Corrective Action, Teaching by Postdocs, the Annual Review Policy, etc.
- 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:** https://www.nationalpostdoc.org/page/TaxIssuesforPostdocs?&hhsearchterms=%22tax+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/

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.

LIST A Documents that Establish Both Identity and Employment Authorization	**OR**	LIST B Documents that Establish Identity	**AND**	LIST C Documents that Establish Employment Authorization

LIST A	LIST B	LIST C
1. U.S. Passport or U.S. Passport Card	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	1. A Social Security Account Number card, unless the card includes one of the following restrictions: (1) NOT VALID FOR EMPLOYMENT (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)		
3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa	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	2. Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)
4. Employment Authorization Document that contains a photograph (Form I-766)	3. School ID card with a photograph	3. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal
5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status: a. Foreign passport; and b. Form I-94 or Form I-94A that has the following: (1) The same name as the passport; and (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.	4. Voter's registration card	
	5. U.S. Military card or draft record	
	6. Military dependent's ID card	4. Native American tribal document
	7. U.S. Coast Guard Merchant Mariner Card	5. U.S. Citizen ID Card (Form I-197)
	8. Native American tribal document	6. Identification Card for Use of Resident Citizen in the United States (Form I-179)
	9. Driver's license issued by a Canadian government authority	
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	**For persons under age 18 who are unable to present a document listed above:** 10. School record or report card 11. Clinic, doctor, or hospital record 12. Day-care or nursery school record	7. Employment authorization document issued by the Department of Homeland Security

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

Refer to the instructions for more information about acceptable receipts.

FREE MEMBERSHIP IN THE

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. Anyone who has an email 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