

HIRING GUIDE FOR POSTDOCS

Posting Open Postdoc Positions

Guidelines on Benefits and Salary/Stipends

Before posting a postdoc position, please consult the [Salary/Stipend Guidelines](#), as well as the [Benefits Information on the monthly rates](#) (it is a requirement to provide Single *and* Family levels of coverage).

Posting a Position

Your position should be submitted to [Interfolio](#) by your department administrator. Once the position has been approved by The Office of Faculty Advancement and Postdoctoral Affairs, it will be listed on the [Academic Careers page](#). The position will be posted for a minimum of 5 days, but the standard is 90 days.

The Office of Faculty Advancement and Postdoctoral Affairs can also share your job posting on the [CWRU Postdocs Twitter](#) and [Postdoctoral Affairs LinkedIn](#) page to get the word out

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 [Interfolio](#) 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.

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 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 postdoctoral candidate will fill out all necessary information to complete the SIS record in Interfolio. The postdoc candidate is required to upload a resume/CV when applying for the position in Interfolio.
3. 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.
4. The department administrator will gather the required documents and information for the appointment and visa process.
5. 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 #

PostDoc Search Match

Specific Search

Campus ID

OR

Empl ID

OR

Postdoc ID

Search

Clear

Search Results

Personalize | Find | View All | 1 of 1 | 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 | | | | Male | | |

PostDoc List

Personalize | Find | View All | 1-2 of 2 | 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 | | |
| 2 | Renewal | Edit | View | Delete | 006985 | 12/18/2023 | 12/17/2024 | Data Chg | 687010 | Pending | | |

PostDoc Srch

Post Doc Search M...

Personal Information

Appointment

Academic

Visa

Attachment

Postdoc ID 005488

Sta

Appointment

*Start Date

31

*End Date

31

*Appointment Classification

*Appointment Type

New Appointment

BioDemo Data

*Empl ID

First Name

Last Name

Date of Birth

Address Line 1

Address Line 2

Country

City

Telephone

Email Address

Middle Name

State

Department Contact Information

Contact Name

Contact Department

Contact Phone

Contact Email

Save & Submit

Save as Draft

Return to Search Match

Personal Information | Appointment | Academic | Visa | Attachments | Approval

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)

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)

Demo section will be pre-populated.

Save as Draft often to avoid loss of any data!

TAB 2 – APPOINTMENT INFORMATION (Part 1)

PostDoc Srch Post Doc Search M. :
 Personal Information **Appointment** Academic Visa Attachments Approval
 Postdoc ID 005488 Status Draft

***Approving Department** (6-digit code)
***Mentor Emplid** (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** (Full Time)
***Professional Activity** (If the department wants to hire a part-time postdocs, prior Postdoc Office approval is required; full time equivalent salary must meets NIH guidelines)
Benefits
 Plan Type (Single)
 Speedtype
 Additional Speedtype
 Comments

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

Funding Total

Total Amount

Funding Sources

Find | View All First 1 of 1 Last

Sequence Number 1

*Funding Source

*Agency/Institution Name

Description

*Dollar Amount

*Speedtype

*Funding PI Emplid

OR

☐ PostDoc is Principal Investigator

*Case Paycheck Case Paycheck

Save As Draft frequently!

Save & Submit

Save as Draft

Return to Search Match

Personal Information | Appointment | Academic | Visa | Attachments | Approval

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"

Speedtype: Use the magnifying glass to look up account number

Funding PI EMPL: typically same as the Mentor above

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

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

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


Prior Degree Date: date that terminal degree was earned

Prior degree: terminal degree (MD, DMD, PhD, JD, etc. If they have multiple degrees, add both to system (ie: PhD & MD; divided by comma)

New window | Help | Personalize Page

Personal Information | Appointment | **Academic** | Visa | Attachments | Approval

Postdoc ID 005488 Status Draft

Prior Degree Date  **Prior Degree**

Prior Degree Institution

Prior Degree Institution: Please include name & country of the institution

Prior PhD/Doc Advisor

Prior Research Title

Prior NIH Support

Prior Postdoc Institution

Prior Postdoc Research Title

Not required, we currently do not use these fields.

Prior Postdoc Department

Prior Postdoc Advisor

Residency Institution

Residency Dept

Residency Post Grad Year

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 J1 visa holder
- **O1:** Extraordinary Ability
- **OTH:** Other, Non-Student
- **TN:** TN Canadian/Mexican Business; Trade NAFTA Visa – for citizens of Canada or Mexico only

The screenshot shows the 'Visa' tab in the Scholar Portal. The form is for Postdoc ID 005488, Maria Gerasimenko, with a Status of Draft. The 'Visa' tab is highlighted with a blue circle. The form includes the following fields and annotations:

- *U.S. Citizenship:** A dropdown menu currently set to 'No'. A red box highlights this field, with an annotation: "US Citizenship: select YES/NO".
- *Applying for Visa:** A dropdown menu currently set to 'Yes'. An orange box highlights this field, with an annotation: "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".
- Required if Applying for visa:** A section containing several fields:
 - Visa Type:** A dropdown menu with a search icon. A blue box highlights this field.
 - Visa Start Date:** A date field with a calendar icon. A green box highlights this field.
 - Visa End Date:** A date field with a calendar icon. A green box highlights this field.
 - Foreign Medical Graduate:** A dropdown menu currently set to 'No'.
 - Teaching Percent:** A text input field.
 - Research Percent:** A text input field.
 - Patient Care Percent:** A text input field.
 - Other Percent:** A text input field.
- Minimum Degree Required:** A text input field.
- Field of Education:** A text input field.
- Minimum Years of Experience:** A text input field.
- Short Appointment:** A dropdown menu currently set to 'No'.
- Accompany Dependents:** A dropdown menu currently set to 'No'.

A grey box annotation points to the 'Foreign Medical Graduate' and 'Short Appointment' fields, stating: "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.

New Window | Help | Personalize Page

Personal Information | Appointment | Academic | Visa | **Attachments** | Approval

Postdoc ID 00548 **Click here for CWRU Grads: no diploma upload needed.** Status Draft

Case Western Reserve University Graduate **Click "+" to add additional attachments**

☐ Case Graduate

Add Attachments Find **View All** First 1 of 1 Last

Sequence Number 1

*Attachment Type

Attached File

Comments Text

How to attach a File:

- Click on "Add"
- Choose File
- "Upload"

Attachment Type (Drop-Down):

- Appointment Letter
- CV: Current CV
- DIPLO: Diploma/Transcript/Letter of Completion (Postdoc's doctoral diploma or transcript with degree posted and date conferred (translated if applicable)**)
- English Proficiency Checklist
- EXP: Expense Statement (CAS)
- PD: Personal Data Form/Salary Auth (SOM)
- Annual Review

Add **Delete**

Save & Submit **Save as Draft**

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.**

The screenshot shows the SIS interface for the Approval Tab. The top navigation bar includes tabs for Personal Information, Appointment, Academic, Visa, Attachments, and Approval. The Postdoc ID is 005478. The Status is Pending. The Approval Group Box shows the Department Stage with a Post Doc: Pending status. The workflow is as follows:

- Approved:** To, Binh Uyen (CW_DEPT_LVL_10, 05/05/21 - 11:52 AM) and Jung, Timerra Jo (CW_DEPT_LVL_20, 05/12/21 - 9:57 AM).
- Pending:** Multiple Approvers (CW_DEPT_LVL_30).
- Skipped:** No Approvers Found (CW_DEPT_LVL_40).

Below the workflow, there are four buttons: Re-Submit, Approve, Pushback, and Deny. A Comments Text box is located below these buttons, with a Save Comments button. The following annotations explain the actions:

- 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.** (Points to the Status Pending label)
- Please write in Comments Text Box if there are items you wish to highlight for others in approval chain.** (Points to the Comments Text box)
- 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.** (Points to the Deny button)
- 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.** (Points to the Pushback button)
- 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.** (Points to the Approve button)
- APPROVE will send the record to the next person in the approval chain.** (Points to the Approve button)
- RESUBMIT will send the record back to the first person in the approval chain.** (Points to the Re-Submit button)

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.*