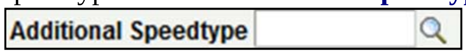
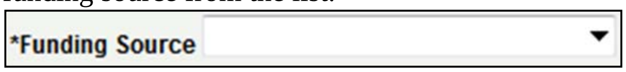
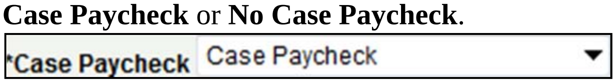
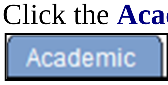
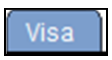
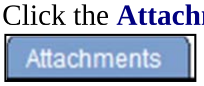
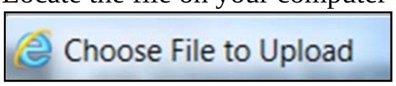
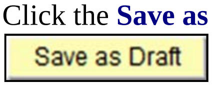
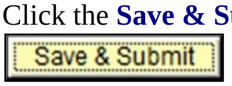
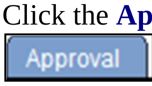
Post Doc Search Match and Entry

Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Click the **Campus Community** menu.
3.	Click the **Post Doc Search Match** link. Post Doc Search Match
4.	Enter the CWRU Network ID, Empl ID or a Postdoc ID information into either the **Campus ID** (Network ID), **Empl ID** or **Postdoc ID** fields to locate their record in the SIS. Please note that if you do not have any of these ID's you will need to contact postdoc@case.edu.
5.	Click the **Search** button. Search
6.	**Decision:** Did the search return results? • Yes Go to step 7 on page 1 • No Go to step 59 on page 5
7.	Locate the correct individual in the search results. To create a new Post Doctoral application, click the **New** button. New
8.	**Decision:** Which button did you click? • New Go to step 9 on page 1 • PD Data Go to step 60 on page 6
9.	A box will appear stating “You are about to create a new PostDoc ID, click OK to continue.“ Click the **OK** button. OK
10.	The Personal Information tab appears. Enter the date that the appointment starts into the **Start Date** field.
11.	Enter the date that the appointment ends into the **End Date** field.

Step	Action
12.	Click the **Appointment Classification** list and select either the **Postdoc Fellow** or **Postdoc Scholar** list item.
13.	Click the **Appointment Type** list and select the appropriate appointment type. New Appointment
14.	The **Empl ID** will populate based on the name selected on the Search/Match screen.
15.	The BioDemo Data will populate based on information entered by the Office of Postdoctoral Affairs. If you have any questions please email postdoc@case.edu
16.	The Department Contact Information section is to enter information on the person the approvers should contact with any questions.
17.	Click the **Appointment** tab. Appointment
18.	Click the **Look up Approving Department** button. *Approving Department
19.	Select the appropriate department from the search results. Optionally, enter the name of the department into the **Description** search field at the top of the window to locate the department's code in the search results. College of Arts & Sciences
20.	Enter the Employee ID of the person that will be supervising the Post Doc into the **Mentor Emplid** field.
21.	Optional: If the individual will also be working with another department, enter the departmental code into the **Secondary Department** field and enter the individual's mentor in this department into the **Secondary Mentor Emplid** field. Secondary Department Secondary Mentor Emplid
22.	Click the **Full/Part Time** list and select either **Full Time** or **Part Time**. If part time is selected, a field will appear to enter the number of hours per week the Post Doc will be working. *Full/Part Time Full Time
23.	Enter a brief description of what the individual will be doing as a Post Doc into the **Professional Activity** field.
24.	In the Benefits box, click the **Plan Type** list and select **Single**, **Dependent** or **Family** from the list. Plan Type Single

Step	Action
25.	Enter the speedtype that will pay for the individual's benefits or click the **Look up Speedtype** button to locate the speedtype in the search window. 
26.	If more than one speedtype will be paying for the individual's benefits, enter the additional speedtype into the **Additional Speedtype** field. 
27.	Optionally, use the **Comments** field if further information regarding the benefits is needed.
28.	In the Funding Sources box, click the **Funding Source** list and select the appropriate funding source from the list. 
29.	Enter the appropriate information into the **Agency/Institution Name** field. Optionally, use the **Description** field to add more information.
30.	Enter the appropriate dollar amount into the **Dollar Amount** field.
31.	Enter the appropriate speedtype into the **Speedtype** field or click the **Look up Speedtype** button to locate the speedtype in the search window.
32.	Enter the Employee ID of the Principle Investigator into the **Funding PI Emplid** field or click the **PostDoc is Principle Investigator** option.
33.	The Case Paycheck field is used to indicate if the individual will be receiving a paycheck from CWRU using this source for its funding. Click the **Case Paycheck** list and select **Case Paycheck** or **No Case Paycheck**. 
34.	To indicate an additional source of funding for the Post Doc, click the **Add a new row** button and fill in the fields to describe the additional funding source. Add as many rows as necessary to indicate all funding sources. 
35.	Click the **Academic** tab. 
36.	The Academic tab is used to enter information about the individual's highest degree and previous post doctoral experience. If the appointment record is a continuation of a previous appointment, the tab will already be populated with information.
37.	Enter information into the following fields: **Prior Degree Date** **Prior Degree** **Prior Degree Institution** **Prior Phd/Doc Advisor** (name) **Prior Research Title** (title of document)

Step	Action
38.	The Prior NIH Support field is used to determine if the individual received support from the NIH in their previous research. Click the **Prior NIH Support** list and select **No prior NIH support** if none was received. If support was received, select either the **Research Grant** or **Training Grant** list item. 
39.	If the individual had a Post Doctoral appointment at another institution, fill out the following fields: **Prior Postdoc Institution** **Prior Postdoc Research Title** (title of document) **Prior Postdoc Department** **Prior Postdoc Advisor**
40.	If the individual is an MD, enter the following fields: **Residency Institution** **Residency Dept** **Residency Post Grad Year**
41.	Click the **Visa** tab. 
42.	Click the **U.S. Citizenship** list and select **Yes** or **No**. 
43.	Click the **Applying for Visa** list and select **Yes** or **No**. 
44.	If the individual is not a US Citizen and is applying for a Visa, enter the rest of the fields on the page: **Visa Type** **Visa Start Date** **Visa End Date** **Foreign Medical Graduate** (yes/no) **Teaching Percent** **Research Percent** **Patient Care Percent** **Other Percent** **Minimum Degree Requirements** (required for Visa type) **Field of Education** **Minimum Years of Experience** **Short Appointment** (yes/no) **Accompanying Dependents** (yes/no) **Appointment Activity Sites** (where duties will be performed) 
45.	Click the **Attachments** tab. 

Step	Action
46.	If the individual is a graduate of Case Western Reserve University, click the **Case Graduate** option. 
47.	Click the **Look up Attachment Type** button. 
48.	Select the appropriate document type from the search window. 
49.	Click the **Add** button. 
50.	The File Attachment window appears. Click the **Browse** button. 
51.	Locate the file on your computer and click the **Open** button. 
52.	Once attached, the file name will display in the **Attached File** field. Optionally, enter comments about the file in the **Comments Text** field.
53.	Click the **Add a new row** button to add additional files to the Attachments tab. Add as many rows as necessary to accommodate all required documents. 
54.	Click the **Save as Draft** button. 
55.	Click the **Save & Submit** button to submit for approval. 
56.	Click the **Approval** tab. 
57.	The Approval tab will display the Post Doc application's status in the workflow.
58.	This completes the process of entering a Post Doc record into the SIS. **End of Procedure.** Remaining steps apply to other paths.
59.	If there are no search results, log out of SIS and contact the Office of Postdoctoral Affairs at postdoc@case.edu. Go to step 6 on page 1

Step	Action
60.	The individual's Post Doc record appears in the PostDoc List box. Click the **Renewal** button to create a new Post Doc record. Click the **Edit** button to create a new Post Doc record. Click the **View** button to update a draft record. Click the **Delete** button to delete the record. PLEASE NOTE: If you have saved a draft that you are coming back to complete, click the View button. 
61.	If you click the **Renewal** or **Edit** button, a box will appear stating that you are creating a new record for the Post Doc. Click the **OK** button.  Go to step 10 on page 1