DA: Post Doc Entry

Begin by logging in the SIS at case.edu/sis with your CWRU Network ID and password.

1. From the **NavBar**, select Navigator > Campus Community > Post Doc Search Match.
2. Enter the CWRU Network ID, EmplID or a Postdoc ID information in the **Campus ID** (Network ID), **Empl ID** or **Postdoc ID** fields to locate the record in the SIS.

   Note: If you do not have any of these IDs, contact postdoc@case.edu.
3. Click the **Search** button.
4. Locate the correct individual in the search results.

   Note: If there are no search results, log out of SIS and contact the Office of Postdoctoral Affairs at postdoc@case.edu.
5. To create a new Post Doctoral application, click the **New** button.

   Note: Some individuals may have Post Doc records appear in the Post Doc list box. Clicking the **Renewal** or **Edit** buttons will create a new Post Doc record.

   If you previously saved a draft record, click the **View** button to update it.

   Click the **Delete** button to delete the record.

   Click the **OK** button after clicking **Renewal**, **Edit**, or **Delete**.
6. A box will appear stating the following:

   You are about to create a new PostDoc ID, click OK to continue.

   Click the **OK** button.
7. The **Personal Information** tab appears. Enter the date that the appointment starts in the **Start Date** field.
8. Enter the date that the appointment ends in the **End Date** field.
9. Click the **Appointment Classification** dropdown list and select either **Postdoc Fellow** or **Postdoc Scholar**.
10. Click the **Appointment Type** dropdown list and select the appropriate appointment type.
11. The **EmplID** will populate based on the name selected on the Search/Match screen.
12. 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.
13. The **Department Contact Information** section is to enter information on the individual the approvers should contact with any questions.

14. Click the **Appointment** tab.
15. Click the **Look up Approving Department** button.
16. Select the appropriate department from the search results. Optionally, enter the name of the department in the **Description** search field at the top of the window to locate the department's code in the search results.
17. Enter the Employee ID of the person that will be supervising the Post Doc in the **Mentor Emplid** field.

    Note: If the individual will also be working with another department, enter the departmental code in the **Secondary Department** field and enter the individual's mentor in this department in the **Secondary Mentor Emplid** field.

18. Click the **Full/Part Time** dropdown list and select either **Full Time** or **Part Time**.

    Note: If **Part Time** is selected, a field will appear to enter the number of hours per week the individual will be working.

19. Enter a brief description of what the individual will be doing as a Post Doc in the **Professional Activity** field.
20. In the Benefits box, click the **Plan Type** dropdown list and select **Single**, **Dependent** or **Family**.
21. 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.
22. If more than one speedtype will be paying for the individual's benefits, enter the additional speedtype in the **Additional Speedtype** field.

    Note: Use the **Comments** field if further information regarding the benefits is needed.

23. In the Funding Sources box, click the **Funding Source** dropdown list and select the appropriate funding source.
24. Enter the appropriate information in the **Agency/Institution Name** field. Use the **Description** field to add more information if needed.
25. Enter the appropriate dollar amount in the **Dollar Amount** field.
26. Enter the appropriate speedtype in the **Speedtype field** or click the **Look up Speedtype** button to locate the speedtype in the search window.
27. Enter the Employee ID of the Principle Investigator in the **Funding PI Emplid** field or click the **PostDoc is Principal Investigator** option.
28. The **Case Paycheck** field is used to indicate if the individual will be receiving a paycheck from CWRU using this source as funding. Click the **Case Paycheck** dropdown list and select either **Case Paycheck** or **No Case Paycheck**.

29. 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.

30. Click the **Academic** tab.

31. The Academic tab is used to enter information about the individual's highest degree and previous post doctoral experience.

    Note: If the appointment record is a continuation of a previous appointment, the tab will already be populated with information.

32. Enter information in the following fields:

    - Prior Degree Date
    - Prior Degree Prior Degree Institution
    - Prior Phd/Doc Advisor (name)
    - Prior Research Title (title of document)

33. The **Prior NIH Support** field is used to determine if the individual received support from the NIH for previous research. Click the **Prior NIH Support** dropdown list and select **No prior NIH support** if support was not received. If support was received, select either the **Research Grant** or **Training Grant**.

34. If the individual had a Postdoctoral 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 (name)

35. If the individual is an MD, enter the following fields:

    - Residency Institution
    - Residency Dept
    - Residency Post Grad Year

36. Click the **Visa** tab.

37. Click the **U.S. Citizenship** dropdown list and select either **Yes** or **No**.

38. Click the **Applying for Visa** dropdown list and select either **Yes** or **No**.

39. If the individual is not a US Citizen and is applying for a Visa, complete the remaining fields:

    - 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)

40. Click the **Attachments** tab.

41. If the individual is a graduate of Case Western Reserve University, click the **Case Graduate** option.

42. Click the **Look up Attachment Type** button.

43. Select the appropriate document type from the search window.

44. Click the **Add** button.

45. The **File Attachment** window appears. Click the **Browse** button.

46. Locate the file and click the **Open** button.

47. Once attached, the file name will display in the **Attached File** field.

    Enter comments about the file in the **Comments Text** field if needed.

48. 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.

49. Click the **Save as Draft** button.

50. Click the **Save & Submit** button to submit for approval.

51. Click the **Approval** tab.

52. The **Approval** tab will display the status of the Post Doc application status in the workflow.

This completes the process of entering a Post Doc record in the SIS.