



CASE

CASE WESTERN RESERVE UNIVERSITY

Office of Postdoctoral Affairs Postdoc Checklist

UPON ARRIVAL TO CAMPUS:

CHECK-IN WITH YOUR DEPARTMENT ADMINISTRATOR

The department should cover the following with you:

- Payroll Authorization: The department will fill out your Personal Data Salary Authorization Form and send it directly to Human Resources (or SOM Admin Services, where applicable). This form must be turned in for you to be put on payroll at Case.
- Keys and Building Access: The department will fill out a Key Request Form that you will take to Access Services (Crawford Hall, Room 18) to obtain your key(s).
(Instructions above are for Case Campus only; see your administrator about obtaining keys and access at other facilities)

GO TO THE HUMAN RESOURCES INFORMATION MANAGEMENT DEPT

(220 Crawford Hall):

- Turn in a copy of your appointment letter (signed accepted by you) to the HR Information Management department. Your information will not be entered into the Human Resources computer system until they have a copy of your letter signed that you have accepted the position.
- Fill out federal and state tax forms (domestic postdocs only). Be sure to take 2 forms of ID: driver's license and social security card (*contact HR Info. Management 368-3270 for alternative forms of ID*)
- Request an I.D./Parking Authorization Form

THE POSTDOCTORAL BENEFITS PROGRAM (PBP)

- Single coverage in the PBP for Postdoctoral Scholars & Fellows should be paid by the fellowship/grant or PI. There are no out-of-pocket costs for postdocs for single coverage.
- All postdocs must either enroll in or waive the plan online. For information about the plan and to enroll online, go to <http://www.garnett-powers.com/case/>.
- If your start date is on the first of the month, your benefits begin immediately. If your start date is after the first of the month, your benefits begin on the first of the following month.
- Turn in the Life Insurance Beneficiary form to Rachel Begley, Office of Postdoctoral Affairs, Nord Hall 604.
- If you have any questions about the PBP, contact Garnett-Powers & Associates at 1-800-319-9557 or casepbp@garnett-powers.com.

GET A CASE I.D. AND PARKING PERMIT

Once you have the authorization form (from Human Resources Information Management department), take it to Access Services (Crawford Hall, Room 18) to get your I.D. card and purchase a parking tag (if applicable).

KEYS AND BUILDING/LAB/OFFICE ACCESS

- Once your department has given you a Key Request Form, take it to Access Services (Crawford Hall, Room 18) to obtain your keys. (*This applies to Case campus only*)
- Your department should take care of setting up building/lab/office access for you on your Case I.D. card.

(OVER)

EMAIL ACCOUNT SETUP

- When you are appointed as a new Case postdoc your email account is automatically created! You just need to activate your account on-line at <https://its-services.case.edu/middleware/NetworkTools/userReg.html>.
- If you need assistance email network-id@case.edu or contact the Help Desk at 368-HELP (x4357).
- If you are a foreign postdoc and do not have a social security number yet, please contact Theresa Grigger (368-5887). She will be able to create a temporary SSN for you to get you network account up and running until you get your "real" SSN. Once you receive the real SSN, please contact network-id@case.edu so that your record can be updated.

GET INFORMED ABOUT PAYING U.S. AND STATE OF OHIO TAXES

Interpretation and implementation of the tax laws is the domain of the IRS and the courts. Postdoctoral Scholars and Fellows should consult their local IRS office about the applicability of the current tax code to their own situations, and for 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
- **State Taxes:** Ohio Department of Taxation www.tax.ohio.gov
- **Guide for Nonresident Aliens - Preparing 2006 Federal Income Tax Returns** (from the University of Texas at Austin, International Office)
<http://www.utexas.edu/international/taxes/>
- **Case Human Resources Compensation Office** can answer questions about pay you receive: 220 Crawford Hall or www.case.edu/finadmin/humres/comp/
- **Case Office of Foreign Faculty and Scholars:** 212 Sears Building, 368-4289 or www.case.edu/finadmin/humres/ffs/

CHECK-IN WITH YOUR PI

You should discuss any additional arrangements that are needed before the official start date.

CHECK-IN WITH THE OFFICE OF POSTDOCTORAL AFFAIRS

Rachel Begley, Postdoctoral Coordinator, is available to answer any questions that you may have related to your postdoc experience here at Case. Feel free to stop by her office, Nord Hall 604, send her an email at rachel.begley@case.edu, or call her at 216-368-0947.

TURN IN A COPY OF YOUR OFFICIAL TRANSCRIPTS TO THE OFFICE OF POSTDOCTORAL AFFAIRS *(if you have not already done so)*

The Office of Postdoctoral Affairs (Nord Hall 6th floor) must have a copy of your official transcripts with your doctoral (or terminal) degree posted and date conferred. Transcripts must be translated into English if applicable.

FOREIGN POSTDOCS: REPORT TO THE OFFICE OF FOREIGN FACULTY & SCHOLARS WITHIN 3 DAYS (212 Sears Building)

- Please call 216-368-4289 to schedule an appointment.
- The Office of Foreign Faculty will assist you with obtaining a social security number, tax status and documentation, and other issues related to being a foreign postdoc.