

Office of Postdoctoral Affairs  
**Postdoc Checklist**

**UPON ARRIVAL TO CAMPUS:**

**CHECK-IN WITH YOUR DEPARTMENT ADMINISTRATOR & FACULTY MENTOR**

The department should cover the following with you:

- Payroll Authorization: The department will fill out your Personal Data Salary Authorization Form (where applicable) and send it directly to Human Resources. This form must be turned in for you to be put on payroll at Case.
- Keys/Building/Lab/Office Access: Your department will take care of setting up building/lab/office access for you on your CWRU I.D. card and set up getting keys if necessary.
- You should discuss any additional arrangements that are needed before the official start date.

**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.

**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

**CHECK-IN WITH THE OFFICE OF POSTDOCTORAL AFFAIRS**

Rachel Begley, Manager of Postdoctoral Affairs, is available to go over the Postdoctoral Benefits Program and answer any questions that you may have related to your postdoc experience here at Case. Feel free to set up an appointment, stop by her office, Nord Hall 604. Send her an email at [rachel.begley@case.edu](mailto:rachel.begley@case.edu), or call her at 216-368-0947.

**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 monthly premium costs for postdocs with 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 1-800-261-7109 or [casepbp@garnett-powers.com](mailto:casepbp@garnett-powers.com).
- **FOREIGN POSTDOCS:** If you do not have a social security number yet, please use your visa number in place of the social security number when enrolling online in the benefits program. Please type in the letter "V" in front of your visa number. Example: V202291530.

**Please Turn Over**

## GET A CWRU I.D. CARD 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).

## CWRU NETWORK ID AND EMAIL ACCOUNT SETUP

- When you are appointed as a new CWRU postdoc your network ID and email account is automatically created! You must be entered in the HCM system by Human Resources first in order to have access to ID activation. Once you are entered in the HCM system, you just need to activate them on-line at <https://its-services.case.edu/middleware/NetworkTools/userReg.html>.
- If you need assistance email [network-id@case.edu](mailto:network-id@case.edu) or contact the Help Desk at 368-HELP (x4357).
- **FOREIGN POSTODCS** (that do not have a social security number yet): please contact the ITS department by emailing [network-id@case.edu](mailto:network-id@case.edu). They will be able to create a temporary ID number for you to get your network account up and running until you get your "real" social security number (SSN). Once you receive your SSN, please contact [network-id@case.edu](mailto:network-id@case.edu) so that your record can be updated.

## ATTEND MANDATORY SAFETY TRAINING & HEALTH SCREENINGS

All postdocs must contact the Department of Occupational and Environmental Safety (DOES) to determine what safety training, health screenings or other safety measures are required by University policy and to arrange to satisfy these requirements **prior** to beginning service in said facilities.

- The Department of Occupational & Environmental Safety provides training for: OSHA Lab Standards, Bloodborne Pathogens, Respirator, Hazard Communication, Vehicle Safety, X-Ray, Laser, and Radiation Training. To schedule your training contact the department at 368-2907. Check out their website: <http://does.case.edu/>.
- For animal care training, please contact the Animal Resource Center on campus <http://labanimals.case.edu/index.html>.
- 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** (216-368-2745) 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 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](http://www.irs.gov)
- **State Taxes:** Ohio Department of Taxation [www.tax.ohio.gov](http://www.tax.ohio.gov)
- **National Postdoc Association's Beginner's Guide to Income Taxation for International Postdocs:** <http://www.nationalpostdoc.org/site/apps/nl/content2.asp?c=eoJMIWOBIRH&b=1482617&ct=3908287>
- **Case Human Resources Compensation Office** can answer questions about pay you receive: 220 Crawford Hall or [www.case.edu/finadmin/humres/comp/](http://www.case.edu/finadmin/humres/comp/)
- **Tax Treaty Information:** Case Office of Foreign Faculty and Scholars: 212 Sears Building, 368-4289 or [www.case.edu/finadmin/humres/ffs/](http://www.case.edu/finadmin/humres/ffs/)