UPON ARRIVAL TO CAMPUS:

☐ CHECK-IN WITH YOUR DEPARTMENT ADMINISTRATOR & FACULTY MENTOR
Your department should cover the following with you:
- Payroll Authorization: The department will fill out your Personal Data Salary Authorization Form (School of Medicine Only) 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 IMMIGRATION AND HUMAN RESOURCE SERVICES WITHIN 3 DAYS OF START DATE (212 Sears Building)
- Please call 216-368-4289 to schedule an appointment.
- The Office of Immigration and Human Resource Services will assist you with obtaining a social security number, tax status and documentation, and other issues related to being a foreign postdoc.

I-9 FORM (EMPLOYMENT ELIGIBILITY VERIFICATION):
ALL new postdocs (must sign an I-9 form within 3 business days of the start date listed in the appointment letter). Failure to do this within 3 days will result in your start date (and pay) being amended to the date you signed the I-9 form.
- Noncitizen postdocs will fill out the I-9 form at the Office of Immigration and Human Resource Services (212 Sears).
- U.S. citizen postdocs will fill out the I-9 form at Human Resources (220 Crawford Hall).

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.*
- 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
* Your information will not be entered into the Human Resources computer system (nor will you receive a paycheck) until they have a copy of your signed letter, all applicable paperwork, and your social security number.

☐ 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, Tomlinson Hall 215. Send her an email at 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 your faculty advisor/department. 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 (after enrolling). 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.

Please Turn Form Over
• If you have any questions about the PBP, contact Garnett-Powers & Associates at 1-888-441-3719 or 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.

☐ GET A CWRU I.D. CARD AND PARKING PERMIT
Once you have the authorization form (from Human Resources Information Management department), go 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 or contact the Help Desk at 368-HELP (x4357).
• FOREIGN POSTDOCS (that do not have a social security number yet): please contact the ITS department by emailing 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 so that your record can be updated.

☐ ATTEND MANDATORY SAFETY TRAINING & HEALTH SCREENINGS
You must work with your department/lab, through 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., STATE, AND LOCAL TAXES
Interpretation and implementation of tax laws is the domain of the IRS (Internal Revenue Service). Postdoctoral Scholars and Fellows should consult their local IRS office about the applicability of the current tax codes, 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:
• State Taxes: Ohio Department of Taxation www.tax.ohio.gov
• Overview of Tax Issues for Postdocs: http://www.nationalpostdoc.org/component/content/article/69-postdocs/187-overview-of-tax-issues-for-postdocs
• CWRU Human Resources Compensation Office can answer questions about pay you receive: 220 Crawford Hall or www.case.edu/finadmin/humres/comp/
• Tax Treaty Information: The CWRU Office of Immigration and Human Resource Services: 212 Sears Building, 368-4289 or www.case.edu/finadmin/humres/ffs/
All Postdocs: You will not automatically receive coverage, you must enroll to activate your benefits.

Research Associate transferring to Postdoc Scholar or Fellow: Your benefits change from the employee program to the postdoc program, you must enroll to activate your postdoc benefits.

(see enclosed sheet for additional information)
Office of Postdoctoral Affairs

Campus Map

Human Resources Information Management Dept: Crawford 220
Access Services: Crawford Basement

Postdoctoral Affairs
Tomlinson Hall 215
216-368-0947

Immigration & HR Services
Sears 212
216-368-4289
Retirement Program
Offered through the National Postdoctoral Association

- A Fixed Deferred Income Annuity is now available to members of the National Postdoctoral Association
- Allows you to invest as little as $50 per month toward a purchase for future retirement income distributions
- For More information, please visit: http://www.nationalpostdoc.org/membership/the-benefits/212-metlife-pension-builder
Case Western Reserve University has purchased a sustaining membership from the National Postdoctoral Association (NPA). This entitles everyone who is affiliated with Case to obtain a free affiliate membership in the NPA. This is a significant new benefit for postdocs and other individuals affiliated with Case.

**Eligibility**
This offer includes postdocs, administrators, graduate students, faculty and alumni. In effect, anyone who has an e-mail address with the domains @case.edu, @cwru.edu, or @po.cwru.edu can join the NPA for free. All you need to do is complete an online or paper enrollment form using your CWRU e-mail address that we have pre-approved.

**Benefits**
Affiliate members receive a modified package of benefits, including subscriptions to NPA publications, access to members-only web content, and eligibility for NPA committee service. Please note that affiliate members are not eligible to vote or serve on the NPA Board of Directors. Affiliate members who wish to vote or serve on the Board of Directors should join the NPA as full individual voting members (dues = $35).

**Enrollment**
The affiliate member enrollment form may be found online at www.nationalpostdoc.org/affiliate_membership.

**Questions?**
Questions about this new benefit may be directed to:
Rachel Begley: rachel.begley@case.edu, or Kenetia Thompson at the NPA: kthompson@nationalpostdoc.org, 202-326-6428.
Individual Development Plans (IDPs) provide a planning process that identifies both professional development needs and career objectives. Furthermore, IDPs serve as a communication tool between individuals and their mentors.

- Long-term career options they wish to pursue and the necessary tools to meet these; and
- Short-term needs for improving current performance.

IDPs are an important part of postdoctoral mentoring, and summaries of trainee experiences provide information to training grant reviewers.

Outline of IDP Process
The development, implementation and revision of the IDP requires an interactive effort between the trainee and the mentor.

<table>
<thead>
<tr>
<th>Basic Steps</th>
<th>… for Postdoctoral Trainees</th>
<th>… for Mentors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1:</td>
<td>Conduct a self assessment</td>
<td>Become familiar with available opportunities</td>
</tr>
<tr>
<td>Step 2:</td>
<td>Survey opportunities with mentor</td>
<td>Discuss opportunities with postdoc</td>
</tr>
<tr>
<td>Step 3:</td>
<td>Write an IDP. Share IDP with mentor and revise.</td>
<td>Review IDP and help revise</td>
</tr>
<tr>
<td>Step 4:</td>
<td>Implement the plan. Revise the IDP as needed.</td>
<td>Establish regular review of progress. Help revise the IDP as needed.</td>
</tr>
</tbody>
</table>

The IDP Process for Postdoctoral Trainees

Step 1. Conduct a Self Assessment
- Assess your skills, strengths and areas which need development. Formal assessment tools can be helpful. (Useful information can be found in Resources: Self Assessment at the end of this document).
- Take a realistic look at your current abilities. This is a critical part of career planning. Ask your peers, mentors, family and friends what they see as your strengths and your development needs.
- Outline your long-term career objectives. Ask yourself:
  - What type of work would I like to be doing?
  - Where would I like to be in an organization?
  - What is important to me in a career?

Step 2. Survey Opportunities
- Identify career opportunities and select from those that interest you.
- Identify developmental needs by comparing current skills and strengths with those needed for your career choice.
- Prioritize your developmental areas and discuss with your mentor how these should be addressed.
Step 3. Prepare an IDP
The IDP maps out the general path you want to take and helps match skills and strengths to your career choices. It is a changing document, since needs and goals will almost certainly evolve over time as a postdoc. The aim is to build upon current strengths and skills by identifying areas for development and providing a way to address these. The specific objectives of a typical IDP are to:

- Establish effective dates for the duration of your postdoctoral appointment.
- Identify specific skills and strengths that you need to develop (based on discussions with your mentor).
- Define the approaches to obtain the specific skills and strengths (e.g., courses, technical skills, teaching, supervision) together with anticipated time frames.
- Discuss your draft IDP with your mentor.
- Revise the IDP as appropriate.

Step 4. Implement Your Plan
The plan is just the beginning of the career development process and serves as the road map. Now it’s time to take action!

- Put your plan into action
- Revise and modify the plan as necessary. The plan is not cast in concrete; it will need to be modified as circumstances and goals change. The challenge of implementation is to remain flexible and open to change.
- Review the plan with your mentor regularly. Revise the plan on the basis of these discussions.

The IDP Process for Mentors

Step 1. Become Familiar with Available Opportunities
By virtue of your experience you should already have knowledge of some career opportunities, but you may want to familiarize yourself with other career opportunities and trends in job opportunities.

Step 2. Discuss Opportunities with Trainee
This needs to be a private, scheduled meeting distinct from regular research-specific meetings. There should be adequate time set aside for an open and honest discussion.

Step 3. Review IDP and Help Revise
Provide honest feedback - both positive and negative - to help postdoctoral trainees set realistic goals. Agree on a development plan that will allow postdocs to be productive in the laboratory, classroom, etc. and adequately prepare them for their chosen career.

Step 4. Establish Regular Review of Progress
The mentor should meet at regular intervals with the postdoctoral trainee to assess progress, expectations and changing goals. On at least an annual basis, the mentor should conduct a performance review designed to analyze what has been accomplished and what needs to be done. A written review is most helpful in objectively documenting accomplishments.

This document was developed by the Federation of American Societies for Experimental Biology (FASEB)’s Science Policy Committee. For more information, contact: Heather Rieff, Ph.D., FASEB Office of Public Affairs (301-634-7650) or hrieff@opa.faseb.org. It has been modified for use by Case Western Reserve University, Office of Postdoctoral Affairs.
Resources*

Self Assessment

The Postdoc Experience

Career Opportunities

Resources on Non-Academic Careers

*these resources are not considered endorsements, per se
**SKILLS ASSESSMENT** (completed by trainee)

<table>
<thead>
<tr>
<th>STRENGTHS:</th>
<th>DEVELOPMENT NEEDS:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**GOALS**

**SHORT-TERM GOALS:**

Research Project Goals (brief paragraph):

<table>
<thead>
<tr>
<th>SHORT-TERM PLANS AND NEEDS FOR IMPROVING CURRENT PERFORMANCE:</th>
<th>Estimated Completion Date</th>
<th>Completion Date (Actual)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What goals would you like to meet?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AND/OR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What skills need to be learned?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How are you going to do this? (List any desired training, courses, assignments)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When are you going to do this? (Course dates, assignment dates, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Completion Date</td>
<td>Completion Date (Actual)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>What skills or tools are necessary? (e.g., courses, technical skills, teaching, supervision)</td>
<td>How are you going to do this? (List any desired training, courses, assignments, opportunities)</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>What is important to me in a career?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What type of work would I like to be doing?</td>
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<td></td>
</tr>
<tr>
<td>Where would I like to be in an organization?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**JOB SEARCH**

**When do you anticipate beginning a job search?**

**What further activity or other training is needed before it is appropriate to start a job search?**

**Please indicate if there are other factors that affect your job search:**

**COMMENTS FROM MENTOR**
## SOURCE OF FINANCIAL SUPPORT FOR TRAINEE

### MENTOR FUNDS

<table>
<thead>
<tr>
<th>Departmental/Program:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mentor Grant (please list agency &amp; grant number):</td>
<td></td>
</tr>
<tr>
<td>Training Grant (please list agency &amp; grant number):</td>
<td></td>
</tr>
</tbody>
</table>

### TRAINEE FUNDS

| Grant (please list agency & grant number): |  |
| Other (please list source): |  |

<table>
<thead>
<tr>
<th>TYPE NAME/TITLE:</th>
<th>DEPT/ PROGRAM</th>
<th>SIGNATURE</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postdoc:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mentor:</td>
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</tbody>
</table>

Please turn in the completed form to: The Office of Postdoctoral Affairs, Tomlinson Hall 215, LC 7027

Approved copies will be sent to: Postdoc Trainee, Mentor, and the Office of Graduate Education, School of Medicine (for SOM trainees).