New Procedures for Postdoctoral Fellows

Postdoctoral Fellows Office
The Graduate School
Temple University
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Participants

- **Aquiles Iglesias, PhD**
  - Dean, Graduate School
  - (215) 204-6578
  - iglesias@temple.edu

- **Chevonne D. Nash, MBA**
  - Project Manager, Postdoctoral Affairs Office
  - (215) 204-6587
  - nashc@temple.edu
  - postdoc@temple.edu

Participants

- **Martyn Miller, Ph.D**.

  Senior Director, Student Services

  International Services

  (215) 204-7708

  mjmiller@temple.edu/ http://www.temple.edu/ois

- **Sharon Loughran**

  Immigration Services Specialist

  International Services

  (215) 204-7708

  sharonl@temple.edu

Participants

- **Donna Calendo**

  Assistant Director, Human Resources

  HR/Information Management

  (215) 204-8793

  Donna.calendo@temple.edu

- **Nina Campellone**

  Administrative Specialist

  HR/Information Management

  (215) 204-6011

  Nina.campellone@temple.edu

Who are the Postdoctoral Fellows?

- A postdoctoral fellow is an individual with a Ph.D., M.D., D.O., D.D.S., D.V.M., O.D., Pharm.D., D.P.M., Sc.D., D.Eng., D.S.N.,

- Graduated from an accredited domestic or an approved foreign institution of higher education

- Associated with the University to obtain advanced research skills under the supervision of one or more members of the University faculty.

- NEW Research and Teaching Postdoctoral Fellows

- Purpose of a postdoctoral fellowship is to provide research training experiences to prepare the individual for permanent employment in an academic or research position.

Criteria for Appointment

- Awarded a doctoral degree in an appropriate field
- Finite in length, no more than five years as a postdoctoral fellow at Temple University
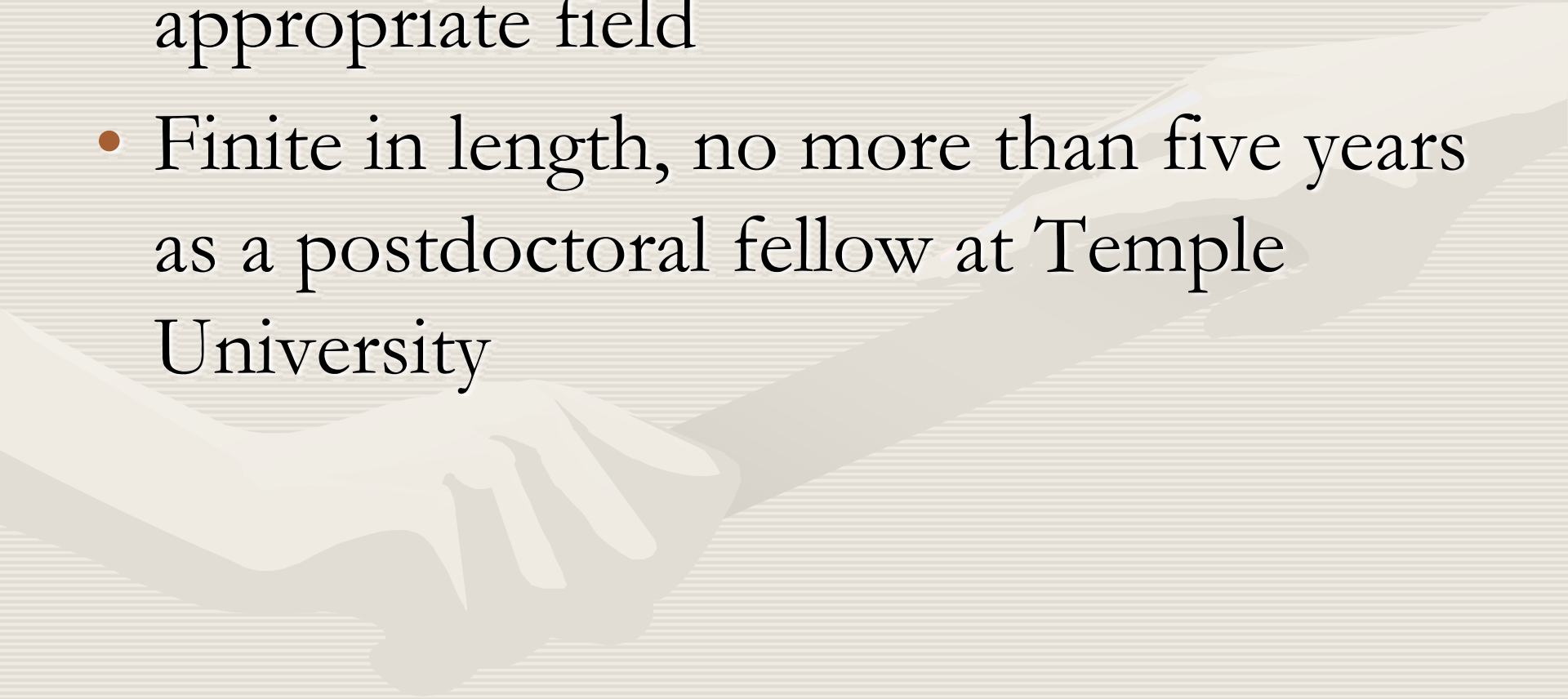
Types of Appointments

- A trainee is compensated, including any fringe benefits, from a training grant or fellowship awarded by an external agency directly to the postdoctoral fellow and is considered to be a student at the University.

- A Research Associate I is compensated, including any fringe benefits, from external funds awarded to the faculty mentor or to a unit of the University for the purpose of conducting research, and is considered to be an employee of the University.

- A Research Associate II is compensated by an external agency (approved by the Dean of the Graduate School) and funds are awarded directly to the individual. These individuals are not university employees, receive no fringe benefits from the Temple University, and are not eligible for H1-B visas

Term of the Appointment

- The total time spent by an individual as a postdoctoral fellow shall not normally exceed five years.

- New appointments are ordinarily made for one year and are renewable annually.

- Multi-year appointments are permissible, provided that adequate funding is available

Terminating Appointment

- If the Faculty Mentor/PI wishes to terminate the postdoctoral fellow appointment due to performance issues:

    – Faculty Mentor should provide postdoctoral fellow with goals and objectives of the research project or body of scholarly work.

    – Concerns regarding progress and performance of the postdoctoral fellow should be discussed during regularly meetings with the Faculty Mentor.
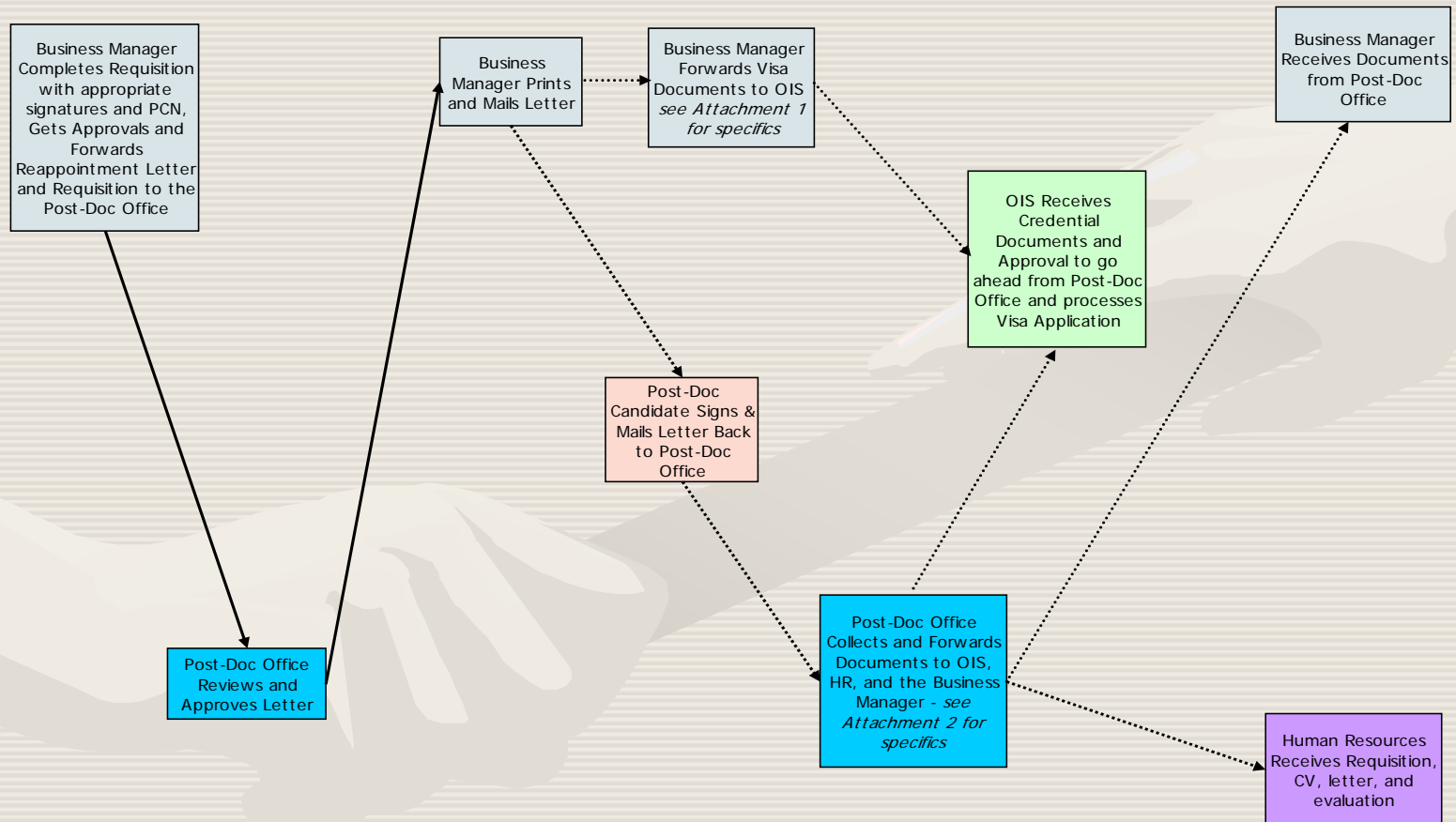
Termination Process

- If postdoctoral fellow continues to fails to meet the expectation and/or performance required of the research project or scholarly work, the Faculty Mentor must inform the postdoctoral fellow, in writing that they have a minimum of 30 days from the date of the letter to improve and meet performance expectations.

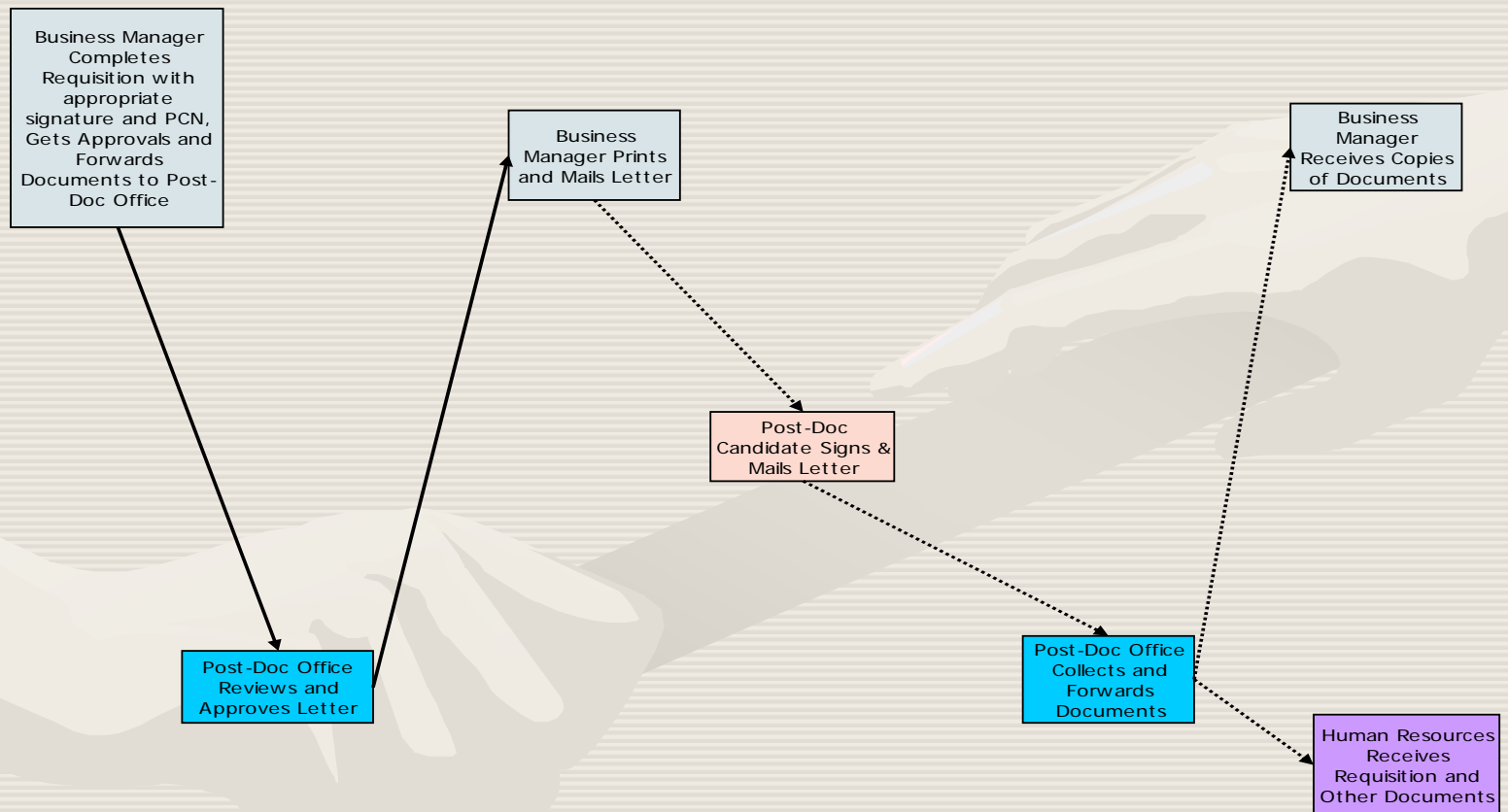# NEW PROCEDURES FOR POSTDOCTORAL FELLOW APPOINTMENTS AND REAPPOINTMENTS

Flow Chart – New Appointment – International Post-Doc Candidate

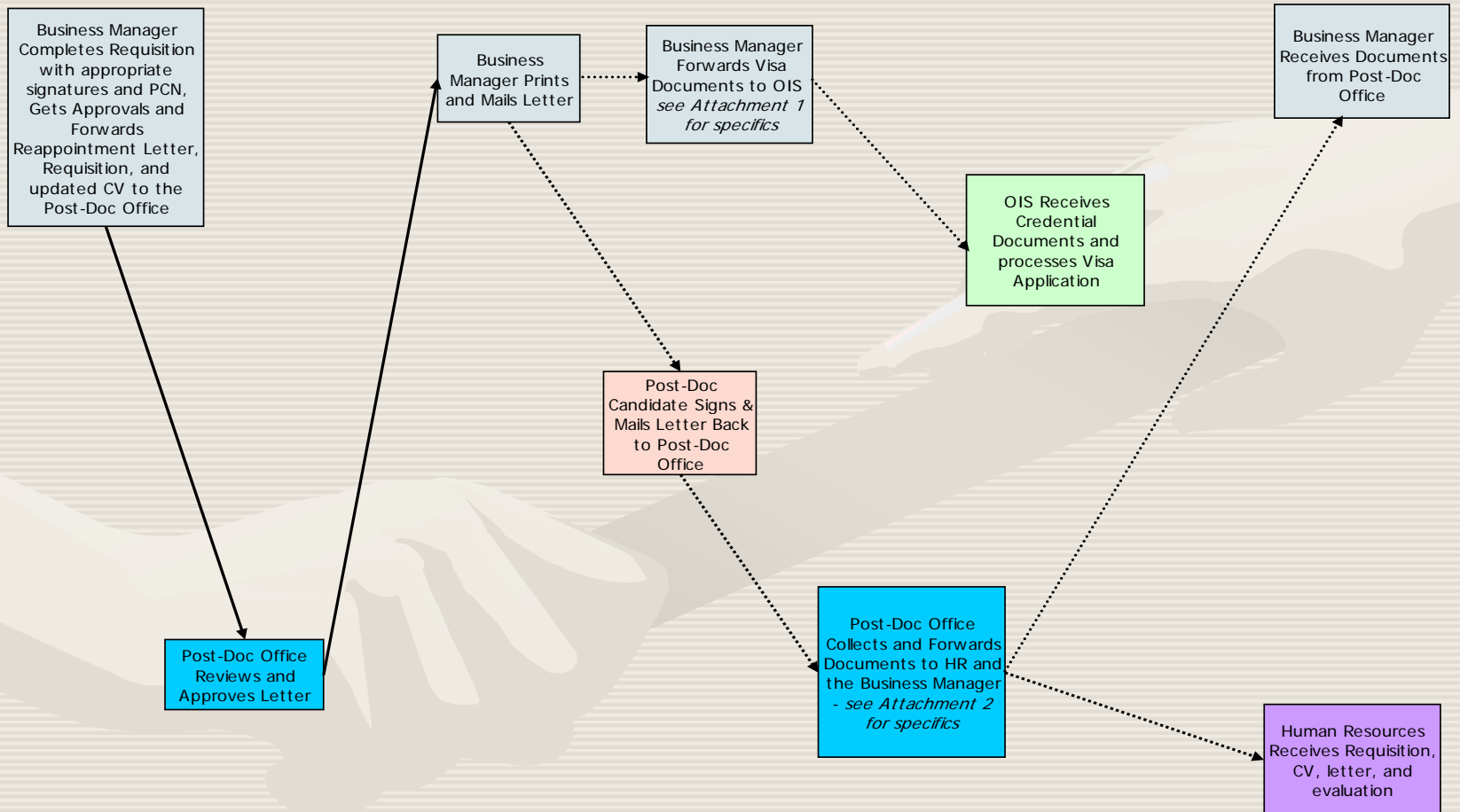→ indicates a Workflow step
┄┄► indicates a non-Workflow step

Business Manager Completes Requisition with appropriate signatures and PCN, Gets Approvals and Forwards Reappointment Letter and Requisition to the Post-Doc Office

Business Manager Prints and Mails Letter

Business Manager Forwards Visa Documents to OIS *see Attachment 1 for specifics*

Business Manager Receives Documents from Post-Doc Office

OIS Receives Credential Documents and Approval to go ahead from Post-Doc Office and processes Visa Application

Post-Doc Office Reviews and Approves Letter

Post-Doc Candidate Signs & Mails Letter Back to Post-Doc Office

Post-Doc Office Collects and Forwards Documents to OIS, HR, and the Business Manager - *see Attachment 2 for specifics*

Human Resources Receives Requisition, CV, letter, and evaluation

Flow Chart – New Appointment Domestic Post-Doc Candidate

→ indicates a Workflow step
⇢ indicates a non-Workflow step

Business Manager Completes Requisition with appropriate signature and PCN, Gets Approvals and Forwards Documents to Post-Doc Office

Business Manager Prints and Mails Letter

Business Manager Receives Copies of Documents

Post-Doc Candidate Signs & Mails Letter

Post-Doc Office Reviews and Approves Letter

Post-Doc Office Collects and Forwards Documents

Human Resources Receives Requisition and Other Documents

Flow Chart – Reappointment International Post-Doc Candidate

→ indicates a Workflow step

┄► indicates a non-Workflow step

**Business Manager Completes Requisition with appropriate signatures and PCN, Gets Approvals and Forwards Reappointment Letter, Requisition, and updated CV to the Post-Doc Office**

Business Manager Prints and Mails Letter

Business Manager Forwards Visa Documents to OIS *see Attachment 1 for specifics*

Business Manager Receives Documents from Post-Doc Office

OIS Receives Credential Documents and processes Visa Application

Post-Doc Candidate Signs & Mails Letter Back to Post-Doc Office

Post-Doc Office Reviews and Approves Letter

Post-Doc Office Collects and Forwards Documents to HR and the Business Manager *- see Attachment 2 for specifics*

Human Resources Receives Requisition, CV, letter, and evaluation

Department's Business Manager

- Completes Post Graduate (DOC/FELLOW) Requisition

- Obtains necessary approvals and signatures

- Forwards completed Post Graduate (Doc/Fellow) Requisition to Postdoctoral Affairs Office for processing.

- Forwards appointment letter/reappointment letter through workflow to Postdoctoral Affairs office

Postdoctoral Affairs Office

- Reviews and approves the appointment/reappointment letter through workflow.

- Returns approved letter to Department's Business Manager.
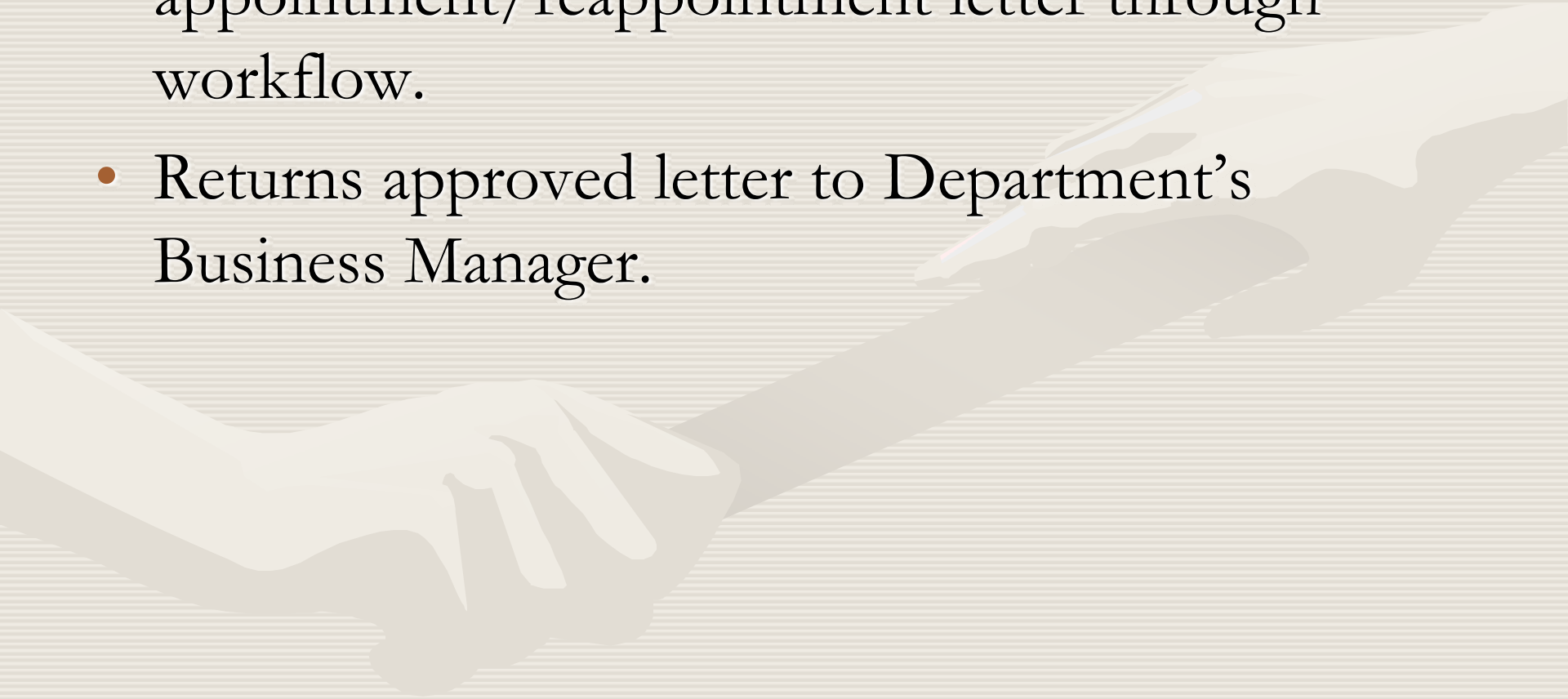
Business Manager

- Prints and mails the appointment/reappointment letter to the candidate informing candidate to sign and return to the postdoctoral affairs office

- If candidate is a foreign national, the business manager also forwards all visa documentation and required fees (checks, money orders, etc.) for visa processing directly to the Office of International Services:

- Postdoctoral Fellow candidate signs and mails letter back to Postdoctoral Affairs Office

Business Manager

- **<u>Forwards to the Postdoctoral Affairs Office</u>:**
  - Updated cv of candidates past experience, credentials, etc.
  - Job description
  - Transcript sent directly to the Postdoctoral Affairs Office (if foreign university/school, the Postdoctoral Affairs Office will accept copies of the foreign transcript)
  - Copy of Doctoral Diploma/Certificate (in lieu of the diploma, and candidate recently completed PhD requirements and successfully defended, they may provide a letter from either the Dean of the School/College or the registrar's office confirming the above)

Postdoctoral Affairs

- If candidate is a foreign national, upon receipt of all the required documents, the Postdoctoral Affairs Office will forward copies of those documents to the Office of International Services and confirm that the candidate has met all requirements for the appointment/reappointment

- Upon confirmation from the Postdoctoral Affairs Office, The Office of International Services will move forward with visa request.

Business Manager

- Prior to start date of appointment, the business manager will schedule the following for the candidate:
  - If Foreign National, candidate will need to meet with the Office of International Service upon arrival to the University.
  - Postdoctoral fellow orientation with Chevonne Nash.
  - University's orientation with the department of Human Resources.
  - Make arrangement for candidate to began the series of Hepatitis B vaccination or sign "declination form" in the Occupational Health Office at Temple University.

Postdoctoral Affairs Office

- Forward Postdoctoral Fellow requisition and other original documents to Human Resources.

- Forward copies of all documents to the Department Business Manager.

- If required, will forward all completed documentation to the Benefits and Compensation department to activate candidate's benefits.

Obtaining a Position Control Number for New Positions

- If position is not supported by any grant funding, then the PCN is created through the Budget Office.

- If position is supported by any grant funding (grants and non-grants), the PCN is created by the Compliance Office.

- The hiring department forwards the appropriate departmental approvals, and supporting paperwork and appointment documents to the Compliance Office.

- After compliance receive, review and approve the documents from the hiring department, they will forward all paperwork including the PCN to the Postdoctoral Affairs Office.

Obtaining a Position Control Number for Replacement or Salary Adjustment

- The hiring department is responsible for supplying the PCN.

- The PCN can be obtained via the Human Resources organization chart by accessing a link on Temple's portal.

- The PCN in the organization chart will be the number that is currently assigned to the postdoctoral fellow that is being replaced or who is receiving the salary increase.

Position Control Numbers

- This number should always be identified on the paperwork for positions that are being replaced or when trying to increase a positions salary prior to sending it for any approval

- Contact for Compliance:
  - Patricia J. Russo, CPA
  - Director, Office of Cost Analysis and Compliance
  - 1001 Carnell Hall (038-17)
  - (215) 204-4844
  - Email address: particia.russo@temple.edu

Documents required for visa application

- **<u>Documents needed from the Department include:</u>**
  - Completed, signed departmental portion of H-1 Application with all questions answered
  - Check for $500 made payable to "Department of Homeland Security" if initial H-1B or transfer
  - Check for $320 made payable to "US Citizenship and Immigration Services (can be paid by employee)

Documents Required from Department

- Department's UPS account number

- OPTIONAL: Check for $1,000 made payable to "US Citizenship and Immigration Services" to expedite adjudication of petition; and

- Documentation of employment-based application for permanent residence (if applicable)
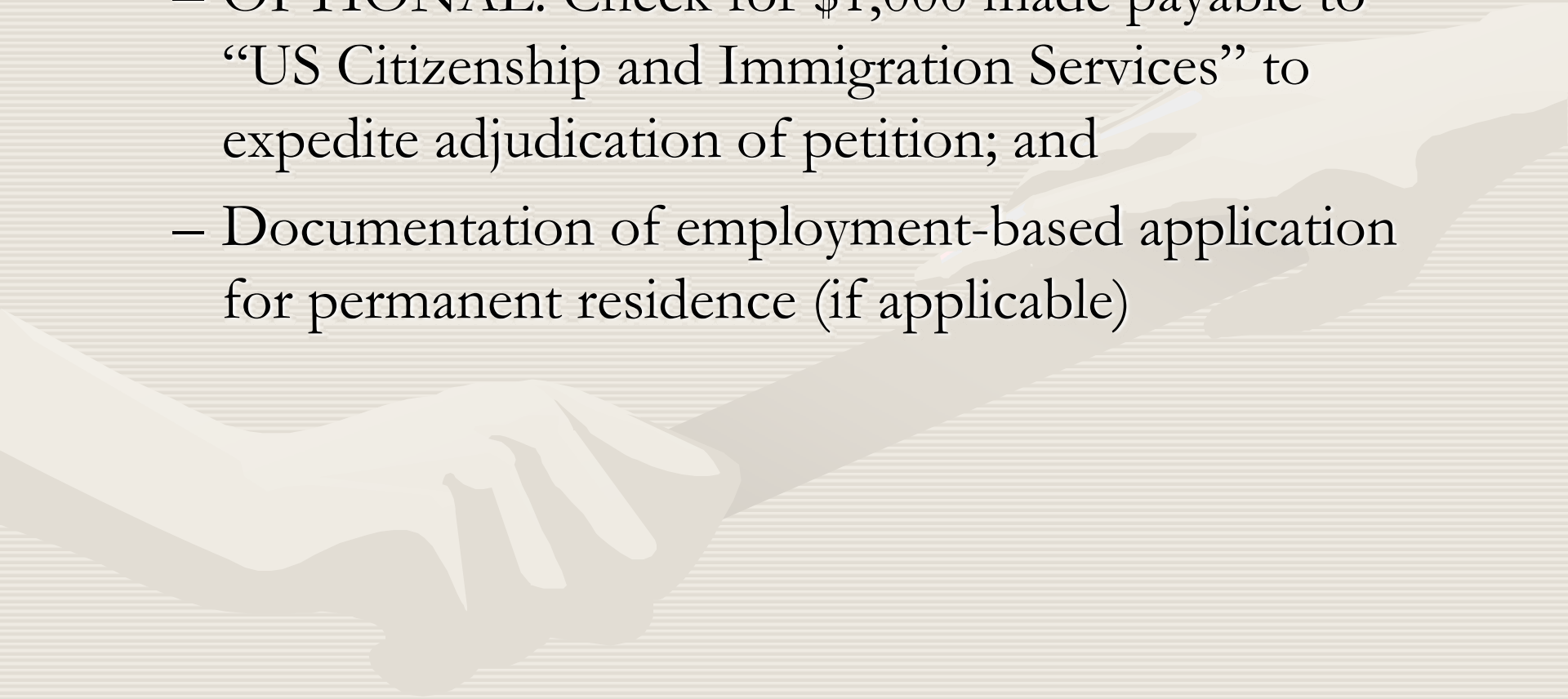
Documents required from Applicants

- **H1-B application include:**
  - Completed, signed employee portion of H-1B Application, including signed Certificate of Authenticity
  - Copy of letter of offer or appointment letter
  - Comprehensive job description
  - Current curriculum vitae or resume

Documents Required from H-1B Applicant

- Legible copies of ALL biographical data, picture, US entry stamps and renewal pages in current passport
- Legible copies of front and back of most recently issued I-94 card (if applicable)
- Legible copies of English-language translations of all diplomas
- If degrees are not from US institutions, evaluation by a formal credentials evaluator (strongly recommended because lack of a formal credentials evaluation may delay the processing of petition

# Documents required from H-1B applicant

- Legible copies of all Forms I-20, DS-2019/IAP66 and EAD documents (if applicable)

- Legible copies of Department of State J Waiver recommendation and US Waiver – Approval Notice (if applicable)

- Legible copies of any previous USCIS notices (if applicable); and

- Legible copies of 3 most recent paychecks to establish current U.S. employment (if applicable)

Documents required from J-1 Applicants

- – Completed DS-2019 Application signed by both the J-1's supervisor and department chair

- – Copy of letter of offer or appointment letter

- – Description of program objective and/or comprehensive job description

- – Current curriculum vitae or resume

- – Copy of biographical and photo page from current passport of J-1 applicant and accompanying J-2 dependents

Documents required from J-1 Applicant

– Copy of all diplomas earned by J-1 applicant

– Copies of any immigration documents if applicant is already in the U.S

– For extension, proof that J-1 has extended health insurance through the new requested extension period
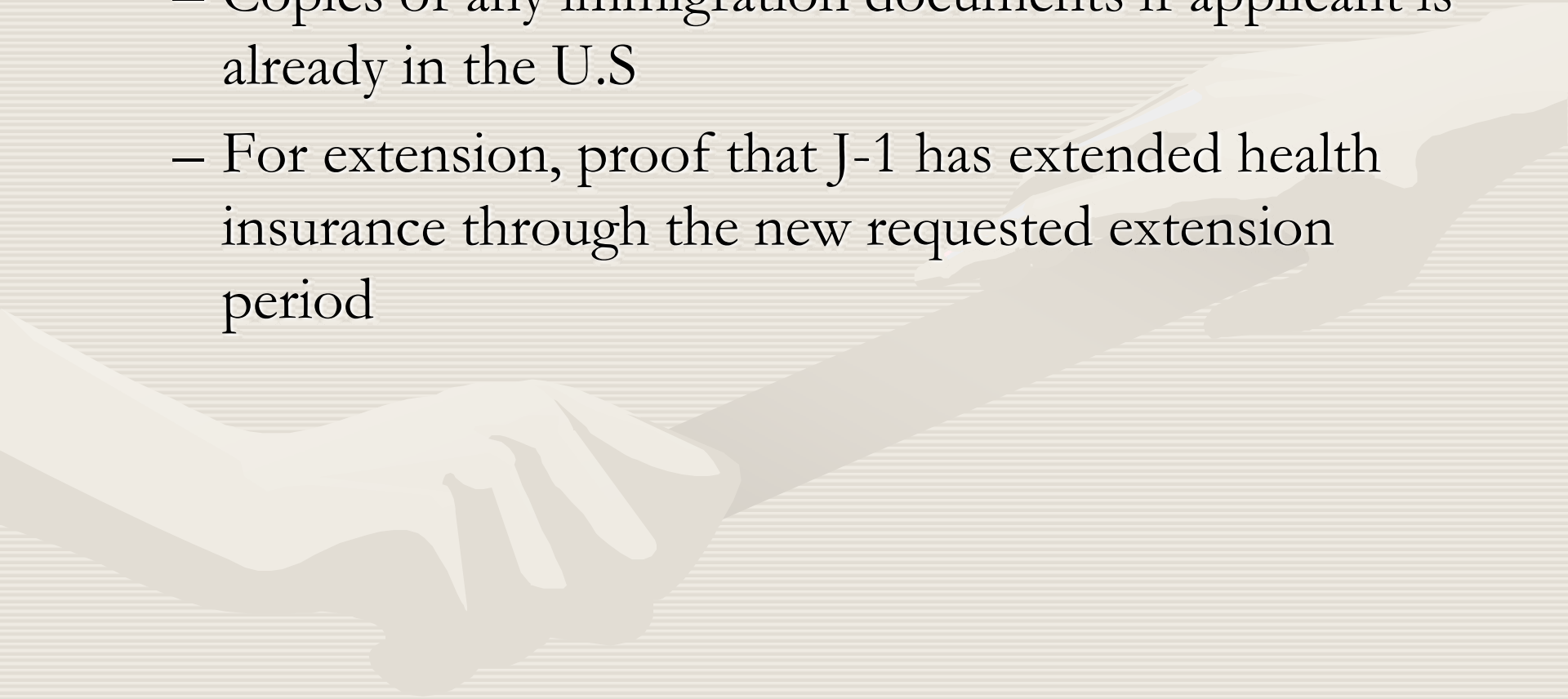
HR/Information Management

- Individuals who are appointed as postdoctoral fellows require a position control number.

- Position control numbers are to be generated or updated prior to giving the completed paperwork to Chevonne Nash, Project Manager, Postdoctoral Affairs

- It's the responsibility of the department to obtain or update the position control number.

- If the postdoctoral fellow is a new appointment, please make sure to include the position control number on the requisition

HR/Information Management

- If the postdoctoral candidate is a re-appointment, please make sure that the position control number has been updated to reflect the current annual salary

- Note that each year the salary is updated the PCN will also need to be updated to the current annual salary. PCN are not updated automatically but at the request of the department.

HR/Information Management

- If the following center number begins with the following center numbers, Cost Analysis and Compliance will create or update PCN:
  - 24xxxxxxx , 26xxxxxxx, 27xxxxxxx, 29xxxxxxx,
  - 30xxxxxxx, 31xxxxxxx, 33xxxxxxx , 36xxxxxxx
  - 39xxxxxxx, 40xxxxxxx, 42xxxxxxx, 43xxxxxxx
  - 44xxxxxxx, 46xxxxxxx, 47xxxxxxx, 49xxxxxxx
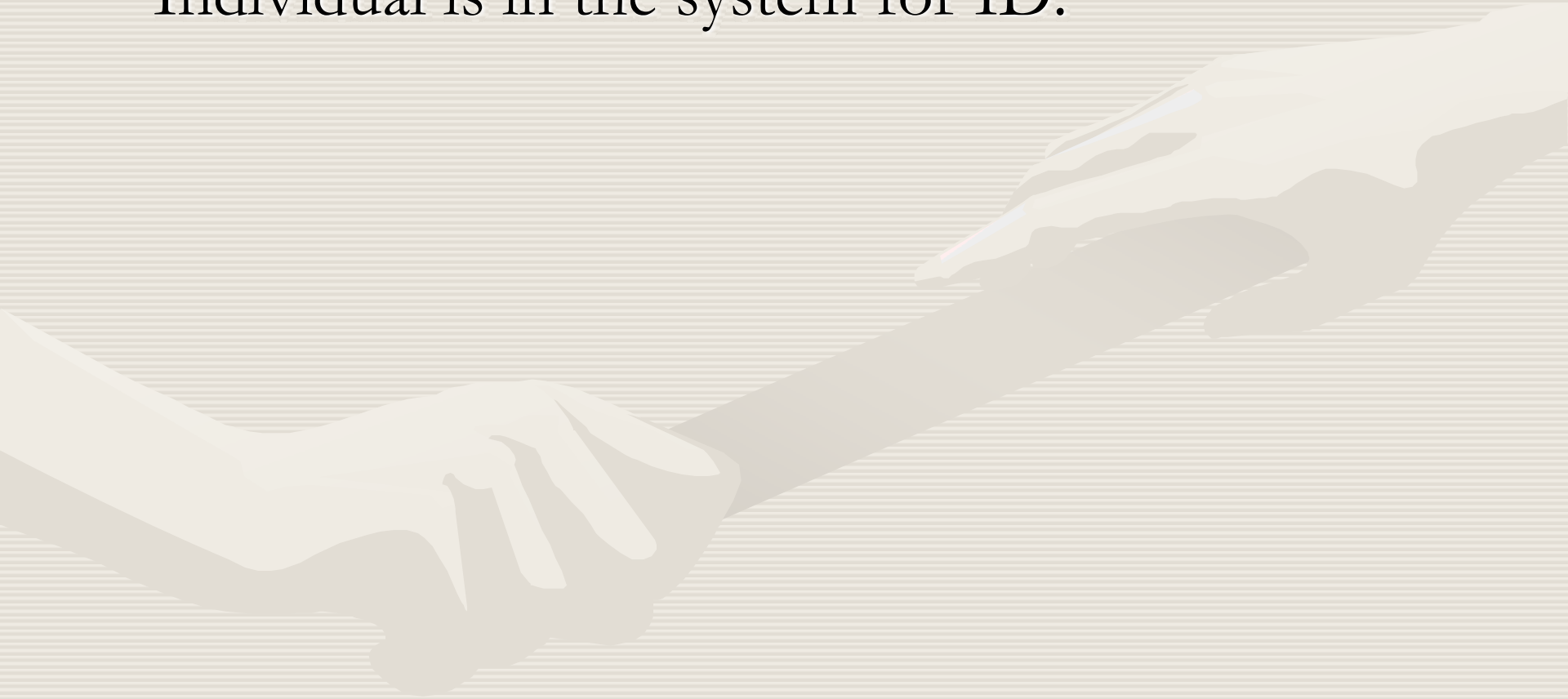 - 55xxxxxxx

HR/Information Management

- **Individuals that are paid by outside funding**
    - Note that Visiting Research Scholars that are not paid by Temple do not get put into the Payroll system. If these individuals need access to obtain a TU ID the follow procedure should be followed
    - Go to the following link to obtain the Temple University Visitor/Courtesy ID request form
    - http://webserv.adminsvc.temple.edu/employee forms/default.htm

HR/Information Management

- When brought to the main page then CLICK on the ACCESS CARD

- The forms page will come up and then you would click on the following PDF form

- Visitor/Courtesy Card Form

- Complete the form and then send completed form to the attention of Kathy Cole. Note that you can also fax this form to 1-215-204-4341.

HR/Information Management

- Kathy will notify the Department when the Individual is in the system for ID.

Notes/Questions

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