Checklist and Frequently Asked Questions for New Postdocs

| **Priority** | **Category** | **Checklist/FAQ Item** | **Audience** | **Contacts** |
| --- | --- | --- | --- | --- |
| onboardingweek 1 | Taxation, payroll for international postdocs | Taxes and GLACIER | International postdocs | - [ISO](https://iso.rochester.edu/taxes/index.html)- Department Administrator |
| onboardingweek 1 | Taxation, payroll for international postdocs | Attend J-1 scholar check-in and orientation | J-1 visa holders | - [ISO](https://www.iso.rochester.edu/employment/scholars/j-maintaining.html) (J-1)- Department Administrator |
| onboardingweek 1 | Taxation, payroll for international postdocs | How to get your SSN | International postdocs | - [ISO](https://www.iso.rochester.edu/employment/ssn/students.html)- Department Administrator |
| onboardingweek 1 | Taxation differences based on job code | Review [Tax Treatment of UR Postdocs](https://www.rochester.edu/graduate-education/wp-content/uploads/2022/01/Tax-Treatment-of-UR-Postdocs.pdf) document | Postdoctoral Associates (093) and Postdoctoral Fellows (095) | - [Payroll Office](https://www.rochester.edu/payroll/)- Department Administrator |
| onboardingweek 1 | Training and development | HIPAA training | URMC postdocs | - [intranet site](https://sites.mc.rochester.edu/departments/hipaa/training-education/)- [myPath website](https://rochester.csod.com/LMS/catalog/Welcome.aspx?tab_page_id=-67&tab_id=20000572) |
| onboardingweek 1 | Payroll, Human Resources | Paycheck, set up direct deposit, etc. | All postdocs | - [HRMS website](https://ps.its.rochester.edu/psp/HRPRD/EMPLOYEE/HRMS/h/?tab=DEFAULT)- [HR Service Desk](http://service.rochester.edu/hr/)- Department Administrator |
| onboardingweek 1 | Identity/access to systems, etc. | URID | All postdocs | - [HRMS website](https://ps.its.rochester.edu/psp/HRPRD/EMPLOYEE/HRMS/h/?tab=DEFAULT), see “Your Information” in the top, right corner of the home page- Department Administrator |
| onboardingweek 1 | Identity/access to systems, etc. | Employee ID | All postdocs | - [HRMS website](https://ps.its.rochester.edu/psp/HRPRD/EMPLOYEE/HRMS/h/?tab=DEFAULT), see “Your Information” in the top, right corner of the home page- Department Administrator |
| onboardingweek 1 | Identity/access to systems, etc. | URMC AD account and email set up for URMC identity | URMC postdocs | - Department Administrator |
| onboardingweek 1 | Identity/access to systems, etc. | NetID – UR identity | All postdocs | - [NetID website](https://tech.rochester.edu/services/netid/)- Department Administrator |
| onboardingweek 1 | Identity/access to systems, etc. | ID card | All postdocs | - [ID Card resources website](https://www.rochester.edu/public-safety/services/id-card-office/)- Human Resources [policy on ID Cards](http://www.rochester.edu/working/hr/policies/pdfpolicies/371.pdf) |
| onboardingweek 1 | Identity/access to systems, etc.  | Parking | All postdocs | - [Contact the parking office](https://www.rochester.edu/parking/) with questions and to obtain parking passes |
| onboardingweek 1 | Identity/access to systems, etc. | Duo Two-Factor Authentication | All postdocs | - [Duo website](https://tech.rochester.edu/services/two-factor-authentication/)- Department Administrator |
| onboardingweek 1 | Identity/access to systems, etc. | Remote access, VPN, webmail | URMC postdocs | - URMC Remote Access Portal [website](https://www.urmc.rochester.edu/remote-access/) |
| onboardingweek 1 | Identity/access to systems, etc. | Link ORCiD ID to U of R | All postdocs | - ORCiD [website](https://orcid.lib.rochester.edu/) |
| onboardingweek 1 | Identity/access to systems, etc. | Sign Intellectual Property Agreement | All postdocs | - [form link](https://www.rochester.edu/orpa/_assets/pdf/form_ipa.pdf)- Department Administrator |
| onboardingweek 1-2 | Training and development | New hire orientationMandatory in-service training | All postdocsSelect postdocs | - Department Administrator- [myPath website](https://rochester.csod.com/LMS/catalog/Welcome.aspx?tab_page_id=-67&tab_id=20000572) |
| onboarding per dept. instruction | Training and development | Lab safety trainingAnimal resource trainingHuman subjects training | Select postdocs | - PI, lab supervisor- Department Administrator- [myPath website](https://rochester.csod.com/LMS/catalog/Welcome.aspx?tab_page_id=-67&tab_id=20000572) |
| onboarding within 30 days | Benefits | How to find a primary care medical provider (doctor, general practitioner) | All postdocs | - [Gallagher](https://clients.garnett-powers.com/pd/rochester/downloads/FindingaMedicalProvider.pdf) postdoc health insurance- Department Administrator |
| onboarding within 30 days | Benefits | Medical and dental insurance- contact Gallagher to sign up for or waive insurance within 30 days of hire | All postdocs | - [Gallagher](https://clients.garnett-powers.com/pd/rochester/plans_benefits/) postdoc health insurance- Department Administrator |
| onboarding within 30 days | Benefits | Life insurance- contact Gallagher to sign up for insurance within 30 days of hire | All postdocs | - [Gallagher](https://clients.garnett-powers.com/pd/rochester/plans_benefits/) postdoc life insurance |
| onboarding within 30 days | Benefits | All benefits for postdocs available from Human Resources | All postdocs | - HR [website](https://www.rochester.edu/human-resources/benefits/employee-benefits-summaries-forms/), see postdoctoral associate and fellow benefits summary at bottom of page |
| year 1, fall semester | Training and development | Responsible Conduct of Research training and course | SMD postdocs | - SMD RCR [website](https://www.urmc.rochester.edu/education/graduate/myhub-professional-development/research-ethics.aspx)- note: postdoc will be notified when registration is available |
| within 6 months of start date | Training and development | Create/update Individual Development Plan | SMD postdocs | - [policy link](https://www.urmc.rochester.edu/education/post-doctoral/forms/postdoctoral-appointment-policy.aspx#GeneralConditionsofAppointment)- PI/supervisor/other mentors |
| annually at least 2 mths. before appt. end date | Appointment policies | Discuss reappointment / non-reappointment | SMD postdocs | - [policy link](https://www.urmc.rochester.edu/education/post-doctoral/forms/postdoctoral-appointment-policy.aspx#GeneralConditionsofAppointment)- PI/supervisor\_Department Administrator |
| annually at reappt | Training and development | Complete Annual Evaluation | SMD postdocs | - [policy link](https://www.urmc.rochester.edu/education/post-doctoral/forms/postdoctoral-appointment-policy.aspx#GeneralConditionsofAppointment)- [form link](https://www.urmc.rochester.edu/MediaLibraries/URMCMedia/education/graduate/documents/Postdoc-Annual-Evaluation.docx)- PI/supervisor |
| as needed | Support services | Ombudspersons | All postdocs | - UR ombuds [website](https://www.rochester.edu/ombuds/contact/) |
| as needed | Peer connections | UR Postdoctoral Association (PDA) | All postdocs | - PDA [website](https://www.rochester.edu/graduate-education/career-development/postdoctoral-association/) |
| as needed | Appointment policies and benefits | School-specific appointment policies | All postdocs | - [SMD policies](https://www.urmc.rochester.edu/education/post-doctoral/forms/postdoctoral-appointment-policy.aspx)- [ASE website](https://www.rochester.edu/college/gradstudies/postdocs/index.html)- [SON website](https://son.rochester.edu/research/post-doctoral.html) |
| as needed | Support services | Disability and Access Service | All postdocs as needed | - SMD Access Services [website](https://www.urmc.rochester.edu/education/post-doctoral/disability-supports-services.aspx)- [ASE website](https://www.rochester.edu/college/gradstudies/postdocs/index.html)- [SON website](https://son.rochester.edu/research/post-doctoral.html) |
| as needed | Academic resources | How to take courses as non-matriculated student | SMD postdocs/courses | - [Non-matric website](https://www.urmc.rochester.edu/education/graduate/non-matriculated-students.aspx)- [SMD Registrar](https://www.urmc.rochester.edu/education/graduate/current-students/registrar.aspx) |
| as needed | Benefits | Tuition benefits | All postdocs | - 093 postdocs are eligible for [UR tuition benefits](https://www.rochester.edu/human-resources/benefits/programs-perks/tuition-benefits/)- 095 postdocs are not eligible for UR tuition benefits but may have tuition funds available via their training grant or fellowship and should check with their training grant PI and/or grants admin- 094 postdocs are not eligible for UR tuition benefits |
| as needed | Academic resources | UR Student | SMD postdocs taking UR coursework | - [URS website](https://wd5.myworkday.com/rochester/d/home.htmld)- [SMD Registrar](https://www.urmc.rochester.edu/education/graduate/current-students/registrar.aspx) |
| as needed | Academic resources | Blackboard | URMC postdocs | - [Blackboard website](https://learn.rochester.edu/webapps/portal/execute/tabs/tabAction?tab_tab_group_id=_1_1)- [Miner Library](https://www.urmc.rochester.edu/libraries/miner.aspx) |
| as needed | Academic resources | Software licensing | All postdocs | - University IT [website](https://tech.rochester.edu/services/software-site-licensing/) |
| as needed | General, benefits, policies | Dean’s Office responsible for postdocs | All postdocs | - [SMD GEPA](https://www.urmc.rochester.edu/education/graduate/contact.aspx)- [ASE website](https://www.rochester.edu/college/gradstudies/postdocs/index.html)- [SON website](https://son.rochester.edu/research/post-doctoral.html) |
| as needed | Training and development | myHub career, writing and grants services | SMD postdocs | - myHub [website](https://www.urmc.rochester.edu/education/graduate/myhub-professional-development.aspx) |
| as needed | Identity/access to systems, etc. | Box | All postdocs | - [Box website](https://tech.rochester.edu/services/box/)- Department Administrator |
| as needed | Identity/access to systems, etc. | NIH eRA | Select postdocs | - Department or Grants Administrator |
| as needed | IT support | ISD Help Desk | URMC postdocs | - (585) 275-3200- helpdesk\_isd@urmc.rochester.edu |
| as needed | IT support | IT Help Desk | All postdocs | - University IT [website](https://tech.rochester.edu/) |
| as needed | Benefits/wellness | Employee Assistance Program (EAP) | All postdocs | - EAP [website](https://www.urmc.rochester.edu/eap.aspx) |
| as needed | Support services | Faculty Professionalism Counsel (FPC) | SMD postdocs | - FPC [website](https://www.urmc.rochester.edu/smd/academic-affairs/professionalism/smd-faculty-professionalism-council.aspx) |