# Onboarding Checklist for New Postdocs

| **Priority** | **Category** | **Checklist/FAQ Item** | **Audience** | **Contacts** |
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| onboarding  week 1 | Taxation, payroll for international postdocs | Taxes and GLACIER | International postdocs | - [ISO](https://iso.rochester.edu/taxes/index.html)  - Department Administrator |
| onboarding  week 1 | Taxation, payroll for international postdocs | Attend J-1 scholar check-in and orientation | J-1 visa holders | - [ISO (J-1)](https://iso.rochester.edu/employment/scholars/index.html)  - Department Administrator |
| onboarding  week 1 | Taxation, payroll for international postdocs | How to get your SSN | International postdocs | - [ISO](https://iso.rochester.edu/employment/ssn/index.html)  - Department Administrator |
| onboarding  week 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 |
| onboarding  week 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) |
| onboarding  week 1 | Payroll, Human Resources | Paycheck, set up direct deposit, etc. | All postdocs | - [Workday](https://wd5.myworkday.com/rochester/d/home.htmld) website  - [HR Service Desk](http://service.rochester.edu/hr/)  - Department Administrator |
| onboarding  week 1 | Work resources | URID | All postdocs | - [Workday](https://wd5.myworkday.com/rochester/d/home.htmld) website, click your photo in the top, right corner of the home page, view profile, click Personal on left side of page, click IDs at top of page  - Department Administrator |
| onboarding  week 1 | Work resources | Employee ID | All postdocs | - [Workday](https://wd5.myworkday.com/rochester/d/home.htmld) website, click your photo in the top, right corner of the home page, view profile, see job details on right side of page  - Department Administrator |
| onboarding  week 1 | Work resources | URMC AD account and email set up for URMC identity | URMC postdocs | - Department Administrator |
| onboarding  week 1 | Work resources | NetID – UR identity | All postdocs | - [NetID website](https://tech.rochester.edu/services/netid/)  - Department Administrator |
| onboarding  week 1 | Work resources | 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) |
| onboarding  week 1 | Work resources | Parking | All postdocs | - [Contact the parking office](https://www.rochester.edu/parking/) with questions and to obtain parking passes |
| onboarding  week 1 | Work resources | Duo Two-Factor Authentication | All postdocs | - [Duo website](https://tech.rochester.edu/services/two-factor-authentication/)  - Department Administrator |
| onboarding  week 1 | Work resources | Remote access, VPN, webmail | URMC postdocs | - URMC Remote Access Portal [website](https://www.urmc.rochester.edu/remote-access/) |
| onboarding  week 1 | Work resources | Link ORCiD ID to U of R | All postdocs | - ORCiD [website](https://orcid.lib.rochester.edu/) |
| onboarding  week 1 | Work resources | Sign Intellectual Property Agreement | All postdocs | - [form link](https://www.rochester.edu/orpa/_assets/pdf/form_ipa.pdf)  - Department Administrator |
| onboarding  week 1-2 | Training and development | - New hire orientation  - Mandatory in-service training | - All postdocs  - Select 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 training  - Animal resource training  - Human 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 | - consider [University Health Service](https://www.rochester.edu/uhs/primary-care/) for primary care  - [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 (IDP) | 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 and benefits | 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 | 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 | Benefits/wellness | Employee Assistance Program (EAP) | All postdocs | - EAP [website](https://www.urmc.rochester.edu/eap.aspx) |
| as needed | Benefits/wellness | Mental Health Resources | All postdocs | - UR Medicine Crisis Call Line - (585) 275-8686 - Monroe Mobile Crises Team - (585) 529-3721 |
| as needed | Benefits/wellness | Childcare subsidy | All postdoc associates | - [website](https://www.rochester.edu/human-resources/benefits/programs-perks/family-care/#subsidy) |
| as needed | Benefits/wellness | Family care program | All postdocs | - [website](https://www.rochester.edu/human-resources/wp-content/uploads/2023/01/PostDoc-Benefits-Summary.pdf) |
| as needed | Benefits/wellness | Food pantry | All postdocs | - [website](https://www.rochester.edu/college/wcsa/services/food-pantry/index.html) |
| as needed | Reporting concerns | Policy Against Discrimination, Harassment, and Discriminatory Employment/Service Practices | All postdocs | - [website](https://www.rochester.edu/policies/policy/discrimination-harassment/) |
| as needed | Reporting concerns | Sexual Misconduct or other Title IX-related | All postdocs | - [website](https://www.rochester.edu/sexualmisconduct/) |
| as needed | Reporting concerns | Research misconduct | All postdocs | - [website](https://www.rochester.edu/orpa/training/facportal/page_06.html) |
| as needed | Reporting concerns | Faculty Professionalism Counsel (FPC) | SMD postdocs | - FPC [website](https://www.urmc.rochester.edu/smd/academic-affairs/professionalism/smd-faculty-professionalism-council.aspx) |
| as needed | Support services | Dean’s Office contacts for postdocs | All postdocs | - [website](https://www.rochester.edu/graduate-education/postdoctoral-appointees/) – see bottom of page |
| as needed | Support services - Peer connections | UR Postdoctoral Association (PDA) | All postdocs | - PDA [website](https://ccc.rochester.edu/pda/home/) |
| as needed | Support services | Ombudspersons | All postdocs | - UR ombuds [website](https://www.rochester.edu/ombuds/contact/) |
| as needed | Support services | Research mentorship | SMD postdocs | - contact [Nathan Smith, PhD](mailto:Nathan_Smith@urmc.rochester.edu), Associate Dean for Research Mentorship |
| as needed | Training and development | 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 | Training and development | How to take courses as non-matriculated student | SMD postdocs/courses | - [SMD non-matric website](https://www.urmc.rochester.edu/education/graduate/non-matriculated-students.aspx) |
| as needed | Training and development | myHub learner life and wellness, career, writing, and grants services | SMD postdocs | - myHub [website](https://www.urmc.rochester.edu/education/graduate/myhub-professional-development.aspx) |
| as needed | Work resources | Disability and Access Services | All postdocs as needed | - UR Office of Disability Resources [website](https://www.rochester.edu/college/disability/current/register.html) |
| as needed | Work resources | Box | All postdocs | - [Box website](https://tech.rochester.edu/services/box/)  - Department Administrator |
| as needed | Work resources | IT Help Desk | All postdocs | - University IT [website](https://tech.rochester.edu/) |
| as needed | Work resources | ISD Help Desk | URMC postdocs | - (585) 275-3200  - [helpdesk\_isd@urmc.rochester.edu](mailto:helpdesk_isd@urmc.rochester.edu) |
| as needed | Work resources | Software licensing | All postdocs | - University IT [website](https://tech.rochester.edu/services/software-site-licensing/) |
| as needed | Work resources | NIH eRA | Select postdocs | - Department or Grants Administrator |