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UNIVERSITY OF PENNSYLVANIA
Biomedical Postdoctoral Programs

Postdoctoral Appointment
Manual for Administrators

BIOMEDICAL POSTDOCTORAL PROGRAMS

Postdoctoral Appointment Manual

For Business Administrators and Research Administrators

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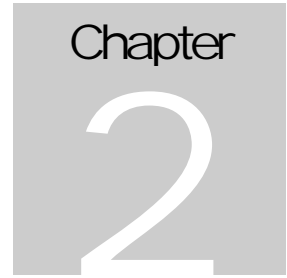
In addition, the Advisory Committee is made up of members of Biomedical Postdoctoral Programs and two representatives from the Biomedical Postdoctoral Council.

The Advisory Committee provides assistance in interpreting the *Postdoc Policy*, solving special concerns, and establishing guidelines and protocols which will contribute to the success of the Office. The Committee has also been integral to establishing programmatic objectives and developing a postdoctoral training program.

Biomedical Postdoctoral Council

In the Fall of 1999, postdocs in the School of Medicine voted on the manner in which they would like to have their presence and opinions represented. The decision was to form a postdoctoral council made up of approximately 20 postdocs from different departments, divisions and centers throughout the Medical School. This Council is supported by Biomedical Postdoctoral Programs and its main missions are outlined in the Council Charter as follows:

- I. Mission
 - a. The members of the Biomedical Postdoctoral Council will strive to promote interaction among postdoctoral appointees on an academic, social, political and cultural basis, while also assisting departments and Biomedical Postdoctoral Programs in this endeavor.
 - b. The members of the Biomedical Postdoctoral Council will support postdocs in all aspects of their professional research training and career development.
 - c. The members of the Biomedical Postdoctoral Council will act as a liaison to the postdoctoral population at large and represent postdocs' interests to the Biomedical Postdoctoral Programs, the School of Medicine, School of Dental Medicine, School of Veterinary Medicine and the University.
 - d. Designated members of the Biomedical Postdoctoral Council, as chosen by the Council membership, will serve as representatives on the Biomedical Postdoctoral Programs Advisory Committee.



Explanation of Current Policies

The BPP Advisory Committee recommends that the postdoctoral title be reserved for individuals that have recently received their qualifying terminal degree. In general, individuals several years past this degree should already be in a permanent career track and not considered trainees. Postdoctoral appointments are, by nature, preparatory and therefore there is an obligation for the institution, school, department and faculty mentor to provide training.

The following definition has been approved as part of the *Policies for Postdoctoral Appointments, Training and Education in the University of Pennsylvania School of Medicine*:

A postdoctoral appointee is a person who has recently earned a Ph.D., M.D. or equivalent doctoral degree, and who joins the University of Pennsylvania to perform research full-time under the supervision of a member of the faculty. The position can be held for up to five years at the University of Pennsylvania irrespective of previous postdoctoral experience at other institutions. The position is meant to provide additional research and/or scholarly training in preparation for a position in academe, industry, or government.

Postdoctoral Appointments, Reappointments, and Terminations

- Per the *Handbook for Faculty and Academic Administrators*, postdoctoral appointments are made on an annual basis for no more than five years irrespective of institution at the University of Pennsylvania.
- Postdocs are considered “academic support staff” positions per the *Handbook for Faculty and Academic Administrators*, and are NOT covered by many of the policies for traditional staff, student, and faculty positions. As a result, the *Policy for Postdoctoral Fellows in the Physical, Biological, and Health Sciences and in Engineering*, was created in 1996 (see Appendix:: Policies), and was the primary policy document for individuals in this title. In September 2004 the policy was revised and is now the *Policy for Postdoctoral Fellows at the University of Pennsylvania*. The BPP policies for postdocs in the Schools of Medicine, Dental Medicine and Veterinary Medicine were revised in 2006 to bring them closer to the general university policy (see BPP *Policies for Postdoctoral Appointments, Training and Education at: <http://www.med.upenn.edu/postdoc/documents/policies/pdf>*)
- The University specifies three postdoctoral titles for use in the Payroll/Personnel System (see Chapter 4).
- School of Medicine, School of Dental Medicine and School of Veterinary Medicine Faculty and Business Offices must use the approved standardized appointment letters and process for biomedical postdoctoral appointments.
- Foreign national appointments must comply with all University, state and federal guidelines and regulations as they pertain to immigration. The Office of International Programs should be contacted whenever the appointment of a foreign national is anticipated.

Letters

The standardized postdoctoral initial appointment and reappointment letters were by prepared Biomedical Postdoctoral Programs and approved by the BPP advisory committee. Letter templates contain critical information meant to outline the working relationship and to protect both the mentor and the postdoc. Letters are available on-line or as an e-mail attachment. When contacting BPP to request letters, please indicate what type of computer and software you have. The types of letters and what they include are outlined below:

Initial Appointment Letters (see Appendix: Letters)

It is critical that Initial Appointment Letters are sent well in advance of the postdoc's anticipated start date. This allows both the faculty mentor and the postdoc to ask any questions and to clarify the terms of their future appointment. It also allows the department and faculty member to assist the postdoc with completion of any visa paperwork (if needed) as well as provide the postdoc with time to obtain the necessary documentation of his or her terminal degree.

The time prior to the initial appointment is the best time to address additional concerns, such as housing. See Chapter 7 for more resources.

- Official University Title
- Work Project Description
- Start Date
- Length of Appointment (one year from start date)
- Conditions of Appointment
- Health Insurance Information/SRA Info
- Postdoctoral Policy
- BPP Postdoctoral Appointment Manual
- Patent Policy Information
- Foreign National
- Diploma/Degree Requirement
- Signatures

Renewal Letters

Postdoctoral appointments are renewable. Postdoctoral positions are annual appointments and thus, a postdoc's reappointment date will always be the same day and month as the initial start date even if the postdoc transfers to another department or lab on a date other than the reappointment date. For example, if a postdoc began on 5/1/06, her reappointment date will always be 5/1 of the respective year.

As with initial appointments, renewals should be one year in length. Departments who wish to have a shorter or longer period of appointment must consult with BPP to discuss the specific situation.

1. **Annual Reappointment:** Towards the end of each appointment year, Faculty mentors should review the performance of the postdoc, research needs of the lab, and their budget to determine whether or not to renew the postdoc's appointment. If they decide to renew the appointment, they must give the postdoc a standardized renewal letter. Faculty mentors are also encouraged to discuss performance, including productivity, with postdocs at this time. **Three months** in advance of the end of appointment is the required time frame for these conversations and for drafting renewal letters.
2. **Terminal Reappointment:** The *Policy for Postdoctoral Fellows at the University of Pennsylvania (September 2004)* states that "no doctoral postgraduate can serve at the University of Pennsylvania for more than five years at the status of postdoctoral fellow". The "terminal reappointment" letter is sent to a postdoc who is at the end of his/her fourth year to indicate that the coming year is the fifth and final year that he or she can remain in the postdoc title.

Departmental Transfer Letters

This letter was created specifically for biomedical postdocs who transfer from one department to another during their current appointment period. When a postdoc transfers to another department it **does not warrant** a new start date, but rather the postdoc will continue out his or her current appointment with the new department/mentor until the postdoc's time of reappointment.

Termination Letters

The standardized initial appointment and renewal letters indicate the full term of the appointment (1 year from begin date) and therefore an additional termination letter is not required if the appointment ends on the pre-established end date. However, faculty members are strongly encouraged to remind the postdoc verbally or in writing as the end date approaches if it is their intent to terminate the appointment.

If a postdoc is being terminated on any other date during the appointment year, he/she **MUST** be given the appropriate three months written notice. The standardized termination letter should be used in these instances of funding discontinuation or unsatisfactory performance.

We strongly encourage faculty members to assess postdoc performance and funding resources as often as necessary to provide as much advance notice as possible when there is need for termination. In addition, faculty should consult with the department Business Administrator (BA) and BPP before terminating any postdoc during the appointment year.

The existing University *Postdoc Policy* stipulates that the mentor can only terminate postdoctoral appointments with three months written notice. The purpose of this policy is to protect the postdoc from unfair dismissal. However, rare circumstances may arise where immediate dismissal is appropriate.

Resignations

From time to time, postdocs may wish to resign their appointment prior to the last day of the appointment year. All Biomedical postdoctoral appointees are expected to follow the guideline below:

When a postdoctoral appointee chooses to resign from his or her position prior to the end of the appointment period as indicated in his or her postdoctoral appointment letter, it is expected that he or she will provide at least one month's notice. Upon leaving the laboratory, a postdoc has an obligation to leave the original notebooks, data and reagents in a state that will allow continuation of the project and ensures compliance with the Intellectual Property Policy and other relevant policies of the University.”

Appointment Process and Procedures for Postdoctoral Appointees

1. Identify open position(s).
2. Determine if advertising is necessary. Advertise. NOTE: BPP Faculty with open postdoctoral positions are welcome to post their positions **AT NO COST** on the Biomedical Postdoctoral Programs posting site: <http://www.med.upenn.edu/postdoc/positions.shtml>.
3. Identify candidates. NOTE: Principal Investigators contemplating appointing a foreign scholar to the University should speak with their Senior Business Administrator and the Office of International Programs (215-898-1640). Immigration and Naturalization Service Regulations require that non-citizens apply for, and obtain, the appropriate visa and required endorsement before they can be lawfully employed.
4. Interview candidates and check references. (see Affirmative Action Policy Statement <http://www.hr.upenn.edu/policy/policies/004.asp>)
5. Select final candidate.
6. Process necessary visa paperwork (if applicable).
7. Complete and forward standardized offer letter to candidate (see Appendix:: Letters) after negotiating a start date and initial stipend amount.
8. When candidate has accepted offer, as indicated by countersigning the offer letter, he/she and the Faculty member should discuss any additional arrangements that are needed before the official start date.
9. When the postdoc arrives, the departmental Business Administrator will complete/collect initial appointment paperwork with the new postdoc (**see Appendix: Forms for links for all forms listed below**):
 - W-4 Form (Employee's Withholding Allowance Certificate)

- I-9 Form (Employment Eligibility Verification) with copies of documents. Signed by postdoc and Business Administrator.
- Graduate Student & Postdoctoral Appointment Information Form
- Initial Offer Letter (countersigned by postdoc and mentor)
- CV/Resume
- Diploma/Proof of Degree
- Copy of J-1 Department Form (or H1-B Department Form) ***Foreign nationals ONLY
- Postdoctoral Personal Data Form
(http://www.med.upenn.edu/postdoc/documents/pdinfo_000.doc)
- Direct Deposit Form
- PennCard Request Form <http://www.upenn.edu/penncard>
For more information see page 20
- E-mail Address Application (<https://www.med.upenn.edu/apps/my/index.php>)
- Employee Emergency Contact Information Form
- Patent Policy/Participation Agreement Form (Section 2.1.1)
(<http://www.med.upenn.edu/postdoc/documents/patent.policy.02.22.05.pdf>)
- Black Key Application (<http://www.med.upenn.edu/spo/forms.html>)
- School of Medicine Access Key Application OR HUP Identification Card (if applicable)
Contact HUP Security at 349-5593

NOTE: Foreign Nationals MUST complete additional forms. See box below step #12.

10. BAs should assist a postdoc with completing Health Insurance Enrollment. The health insurance enrollment process has recently been made available online and thus, once the postdoc has been added to payroll he or she must make a selection for health coverage online at www.pennbenefits.upenn.edu or by contacting the call center directly at 1-888-736-6236 (prompt 1). Postdocs should receive a Benefits Enrollment Package in the mail approximately two weeks after the postdoc has been entered into the Personnel/Payroll system. The postdoc has a maximum of 30 days in which he or she can select health insurance coverage. If a plan is not selected within 30 days since the initial start date in payroll, the postdoc will automatically be defaulted to Keystone Health Plan East. For more information on current health insurance rates please visit our website at <http://www.med.upenn.edu/postdoc/appointment.shtml>.

In order to confirm that a selection has been made, we ask that the Business Administrator complete the *Postdoc Health Insurance Agreement OR Waiver, Postdoc Survey Sheet, Medical Enrollment/Change Form* (if applicable) and keep it on file along with the other necessary documents for initial appointment. While departments no longer need to send the *Postdoc Health Insurance Agreement* to Human Resources, we recommend that you ask the postdoc to fill out his or her selection and keep this choice on file.

11. Enter the new postdoc using Initial Entry transaction in the Personnel/Payroll system. Refer to Payroll deadlines to ensure that information is entered and processed in a timely manner. Postdocs should be told where to pick up their check and who in the department can answer any payroll related questions.
12. Attach all initial appointment paperwork (Initial Offer Letter, CV/Resume, Diploma/Proof of Degree, Postdoctoral Personal Data Form, Graduate Student & Postdoctoral Appointment Information Form, W-4, I-9, Direct Deposit Form, and any other applicable documents for Foreign Nationals) to “Green” Transaction Sheet. Forward all paperwork to the School of Medicine Department of Finance, 356 Anatomy-Chemistry/6061 within 24 hours of entering “initial appointment” action in Personnel/Payroll system.

PAPERWORK/PROCESS FOR FOREIGN NATIONALS:

Upon arrival, Foreign Nationals must check in with the Office of International Programs to review their visa and entry paperwork, and they must obtain a social security number from the Social Security Office using Application Form SS-5. Business Administrators should then process the postdoc’s payroll. AFTER they are entered on the Payroll System, the following forms must be sent to the Tax Office:

- Copies of the postdoc’s passport, VISA and INS form 1-94, Form I-20 or IAP-66
- Social Security card (or receipt of application for SSN)
- Original I-9 (with documents)
- Original W-4
- Original Graduate Student and Postdoc Appointment Information Form
- Original Direct Deposit form
- Original Foreign National Information Form (FNIF)
- Original Form 8233

Copies of all forms go to SOM Department of Finance with personnel transaction "Green sheet" and a note that originals have been brought to the Tax Office.

Postdocs with questions or concerns should bring their paperwork to the tax office in person or contact the office via e-mail or telephone.

13. Process Late Pay if necessary.

Payroll Titles

Postdocs should be entered into the University's Personnel/Payroll System with one of three possible job titles:

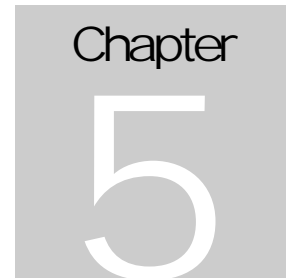
- POSTDOC RESEARCHER (217500)
- POSTDOC FELLOW (217603)
- NRSA POSTDOC FELLOW (217703)

Most postdoctoral appointees in the School of Medicine are funded through Principal Investigator initiated research awards and are classified as Postdoctoral Researchers (see Chapter 10 Report 1-Appointees by Title).

NRSA Postdoc Fellows are funded from individual or institutional NIH Training Grants (called National Research Service Awards OR "F32"s and "T32"s) and are the second largest group of postdocs.

Postdoc Fellows make up less than ten percent of all biomedical postdocs. This title is reserved for a limited number of postdoc initiated fellowships. BAs should exercise care when considering the Postdoc Fellow title.

An ongoing challenge regarding postdoctoral job classification results from the fact that postdocs may have multiple sources of funding. Many funding sources have strict guidelines about the allowability of **supplementation** or additional **compensation** being paid to postdocs on those funds. (For example: The National Research Service Award Guidelines for Individual and Institutional Grants states "Federal funds may not be used for stipend supplementation unless specifically authorized under the terms of the program from which funds are derived.... Under no circumstances may Public Health Service funds be used for supplementation"). Due the uniqueness of each situation, Business Administrators are encouraged to ask for assistance with classifying postdocs whenever necessary.



“Special” Postdocs

- External Stipend Support

A small percentage of our postdocs are paid directly from a foreign government or external company and do not receive their stipend through the University’s Personnel/Payroll system. The appointment process is the same for these individuals and their letters should clearly indicate the source and amount of their funding. These individuals should be put on the University Personnel/Payroll system with an unsalaried postdoctoral title. The University’s *Postdoc Policy* still requires that single health insurance is offered and if chosen, it should be paid for by the mentor or department.

- “Year Out” Clinical Fellows (primarily in Surgery, Orthopedic Surgery or Medicine)

The School of Medicine has postdocs in both its clinical and basic science departments. In clinical departments, clinical fellows may take a “year out” to do research as part of the formal training program in their discipline/specialty. This research year is often funded through a training grant or other University research award and therefore the clinical fellow will be given a full-time postdoctoral appointment on the University’s payroll system for that year. The appointment process on the University’s Personnel/Payroll is the same for these individuals as other postdocs. For these postdocs, a copy of their current medical license will be accepted in lieu of a copy of their diploma. In addition, some clinical fellows will do their year out in research at the **Veteran’s Administration (VA)**. A clinical fellow will only be considered a School of Medicine postdoc if his or her primary funding comes through the School of Medicine.

Stipends

BPP policy states that “Minimum stipend levels for postdoctoral fellows are to be the Ruth L. Kirschstein National Research Service Award (NRSA) recommended postdoctoral stipend levels.”

- All BPP postdoctoral appointees must receive the NRSA recommended minima. (See web link below) Faculty members are strongly encouraged to supplement the minima by appropriate increments if the appointee has prior postdoctoral experience at other universities or institutions.
- Postdoctoral appointees must be brought to the correct and current NRSA level at the time of their annual reappointment based on their additional years of experience at the School of Medicine, School of Dental Medicine and School of Veterinary Medicine.
- The School of Medicine, School of Dental Medicine and School of Veterinary Medicine will monitor that postdocs are being paid the appropriate stipend level, according to the NRSA levels based on their time here at Penn.

Equity in the lab should be considered when making these decisions. Current Postdoctoral Stipend levels can be found at: <http://grants.nih.gov/grants/guide/notice-files/NOT-OD-06-026.html> and on the BPP website. BPP routinely posts the most current notice to the postdoc website.

Biomedical Postdoctoral Programs will review postdoc stipends according to the above guidelines.

Health Insurance

University policy requires that postdocs have health insurance. Postdoctoral appointees are eligible to receive single person health insurance, as provided under a basic University of Pennsylvania Group Health Insurance Plan. This benefit should be paid as an addition to the stipend amount and no premium should be deducted from the stipend of the postdoc.

Postdocs can elect to have family health coverage under the existing University policy. The difference in premium between single and family health coverage can be paid by the postdoc, department/mentor funds, or grant.

The School of Medicine, School of Dental Medicine and School of Veterinary Medicine Administration support the University's Policy regarding health insurance:

- Mentors must pay postdoctoral single health insurance premiums in addition to the stipend.
- Departments or Mentors may choose to pay for postdoctoral family health insurance premiums.
- Mentors who wish to pay for family health insurance from a grant must ensure that it is an allowable cost against that grant. Please note that federal grants and private foundations may differ in their allowable charges.

New postdoctoral health insurance premiums are generally announced prior to the Open Enrollment Period in April of each year.

Waivers, Open Enrollment and Qualifying Life Events:

If a postdoc waives health insurance coverage through the University, he/she must demonstrate alternate insurance which provides at least comparable coverage. If a postdoc waives coverage, he/she **cannot** change waiver status until "Open Enrollment" except for a qualifying life event (i.e. birth, death, etc.). The Penn Benefits Center must be notified of a qualifying life event within 30 days.

Once a year during the "Open Enrollment" period, postdocs will receive a memo regarding health insurance coverage costs and information about any changes in health plan coverage for that year. If a postdoc was enrolled the previous year, he/she will also receive a letter that summarizes his/her current enrollment choice.

Enrolling in Health Insurance

The health insurance enrollment process has recently been made available online. The new automated health insurance selection system reduces the time it takes to choose and finally, select a health insurance provider. The entire process, provided there are no complications*, takes less than a full week from the date that the postdoc begins his or her appointment. The automated health insurance system, ADP, extrapolates information for all new appointed postdocs from UMIS each Tuesday. By Thursday of that same week, the postdoc's information is fully uploaded to the ADP system and by Friday, the system will generate a package full of provider information. The package will then be mailed out to the postdoc on the following Monday. Postdocs should receive a Benefits Enrollment Package in the mail approximately two weeks after the postdoc has been entered into the Personnel/Payroll system.

Once the postdoc's information is stored in the ADP system, the individual may select a health insurance provider at www.pennbenefits.upenn.edu or by contacting the call center directly at 1-888-736-6236 (prompt 1). The postdoc has a maximum of 30 days in which he or she can select a health insurance coverage. If a plan is not selected within 30 days since the initial start date in payroll, the postdoc will automatically be defaulted to

Keystone Health Plan East. For more information on current health insurance rates please visit our website at <http://www.med.upenn.edu/postdoc/appointment.shtml>.

In order to confirm that a selection has been made, we recommend that the Business Administrator have the postdoc complete the *Postdoc Health Insurance Agreement OR Waiver, Postdoc Survey Sheet, Medical Enrollment/Change Form* (if applicable) and keep it on file along with the other necessary documents for initial appointment.

*NOTE: Corporate Tax must approve the postdoc's record in UMIS before the individual's information can be uploaded to the ADP system. An approved record will have an "OK" next the minimum record (003 screen in payroll). In addition, the "salary key" in UMIS must have an "S" for special or else the record will not be uploaded to the ADP system.

Foreign Nationals

Additional insurance requirements may affect **foreign national visa holders** and their families. For further information about medical insurance regulations, call the Office of International Programs.

Taxes

The *Comptroller's Guide to Graduate Student and Postdoctoral Appointments* describes the tax implications of each of the three job class codes and titles for postdocs. The Tax Office is the University designated office to deal with all tax related issues. Per the appointment process, foreign nationals should be encouraged to contact the Tax Office directly due to the complexity of tax laws and tax treaties.

Postdocs should be aware that the Tax Office is the office that the University recognizes as experts.

PennCard IDs

Biomedical Postdoctoral Fellows and Researchers are considered academic support staff at the University of Pennsylvania. As such, they can receive a PennCard **AFTER** they have a valid and active postdoctoral title in the University of Pennsylvania Personnel/Payroll system for at least 24 hours.

REQUIREMENTS:

1. The postdoc must bring a completed, signed and embossed PennCard Request Form to Campus Card Services. The form must have the **"POSTDOC" box checked in the "Other" category**. Make sure to include an Expiration Date, not to exceed one year from the date of issue. PennCard Request Forms can be found at <http://www.upenn.edu/penncard>.

(**NOTE:** DO NOT enter a budget number on the form as there is no charge for a postdoc card.)

2. The Postdoc must present a form of valid photo identification in order to receive his/her PennCard (i.e., a valid driver's license, passport, or other form of official identification).

There is no charge for the card and it is valid for one year. As academic support staff, postdocs will receive a faculty card which indicates "Postdoc" status. (In cases where stipends are paid directly to the postdoc and the postdoc has no active distribution line, these guidelines must still be followed.)

PennCards provide a variety of services and privileges including Library, PennNet, Transit, Recreation, and residence, academic and administrative building access. Questions about the PennCard can be directed to Campus Card Services at 215-417-CARD.

Additional Resources

Many postdocs will be traveling long distances, finding a new apartment, and facing cultural and logistical challenges in their transition. Before an individual begins his or her postdoctoral appointment, the faculty mentor should discuss issues such as housing, schools for children, money needed upon arrival, health insurance, visas, and English language courses. The smoother the transition, the quicker that postdoc will be able to contribute to the laboratory or clinic. This includes the postdoc's time to transition into his or her new research responsibilities.

Faculty and Business Administrators should introduce new postdocs to all lab members, critical collaborators, departmental business office staff, and other important resource people. Postdocs should also be told what types of mandatory research training they should receive.

Biomedical Postdoctoral Programs has Orientation Packets which are given to each new postdoc upon arrival. Packets are available from the Office for faculty who wish to mail them in advance of a postdoc's arrival or use them as a recruitment tool. Postdocs should also be told that BPP holds a triennial New Postdoc Orientation Programs (each May, September, and December). The Biomedical Postdoctoral Council (BPC) holds an informal orientation on the last Thursday of each month. In addition, the Foreign National Committee of BPC (<http://www.med.upenn.edu/bpc/foreignnationals.shtml>) provides seminars on issues that are critical to foreigners, and support and mentorship in the form of a "buddy trainer system." For more information regarding the monthly orientations, please view the **BPC website at: <http://www.med.upenn.edu/bpc>**

For more information about the resources below please consult Biomedical Postdoctoral Programs' webpage at http://www.med.upenn.edu/postdoc/life_at_penn.shtml or contact the BPP.

Bioethics	Ombudsman-University
Biomedical Communications (BMC)	Parking
Career Services	PennCard
Computer Labs	Recreation
E-mail accounts	Research Core Facilities
English as a Second Language	Safety/Victim Services
Environmental Health and Radiation Safety (OEHRS)	Social Security Office
Health Insurance	Vice Dean for Research and Research Training, SOM
Housing	Vice Provost for Research
International Medical Programs	Women's Center
International Programs (OIP)	
Laboratory Animals (ULAR)	
Libraries	
Ombudsman-School of Medicine	

APPENDIX

Policies

- A. Policy for Postdoctoral Fellows at the University of Pennsylvania:
<http://www.med.upenn.edu/postdoc/documents/postdocpolicy.pdf>
- B. Policies for Postdoctoral Appointments, Training and Education (revised 2006):
<http://www.med.upenn.edu/postdoc/document/policies.pdf>
- C. University's Handbook for Faculty and Academic Administrators (Revised 1999):
<http://www.upenn.edu/assoc-provost/handbook>
- D. Postdoc Initial Appointment Checklist: Contact BPP
- E. Comptroller's Guide for Graduate Student and Postdoctoral Appointments:
<http://www.finance.upenn.edu/comptroller/tax/appointments.shtml>
- F. NRSA Stipend Levels: <http://grants.nih.gov/grants/guide/notice-files/NOT-OD-06-026.html>
- G. Postdoctoral Health Coverage Premiums:
<http://www.med.upenn.edu/postdoc/documents/PDMedRatesFY0607.doc>

Letters

<http://www.med.upenn.edu/postdoc/appointment.shtml>

- a. Initial Appointment
- b. Reappointment
- c. Transfer Department (to be used when a postdoc transfer from one department to another during his/her appointment period)
- d. Terminal Appointment Year (5th Year)
- e. Termination

Forms

Forms 1-6 available on the Corporate Tax website:

<http://www.finance.upenn.edu/comptroller/forms/#Tax>

1. I-9 Form (Employment Eligibility Verification)
2. W-4 Form (Employee's Withholding Allowance Certificate)
3. Foreign National Information form
4. Graduate Student & Postdoctoral Appointment Information Form
5. Form 8233-Exemption for Withholding on Compensation for Independent Personal Services of a Nonresident Alien
6. Direct Deposit Form
7. Notice of Appointment of Personnel from Abroad—Note: Form not available online. Form is available from Office of International Programs.
8. PennCard Request Form:
<http://www.upenn.edu/penncard/>
9. Postdoc Personal Data Form:
<http://www.med.upenn.edu/postdoc/documents/pdinfo.doc>
10. School of Medicine Access Black Key Application (898-0197):
<http://www.med.upenn.edu/spo/forms.html>
11. Patent Policy Participation Agreement Form:
<http://www.med.upenn.edu/postdoc/documents/participation.agreement.pdf>