

Office of Postdoctoral Affairs

Postdoctoral Appointment Profile System

User Manual

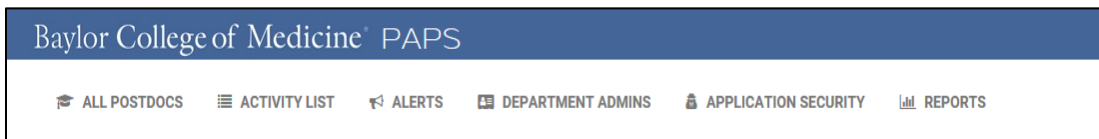
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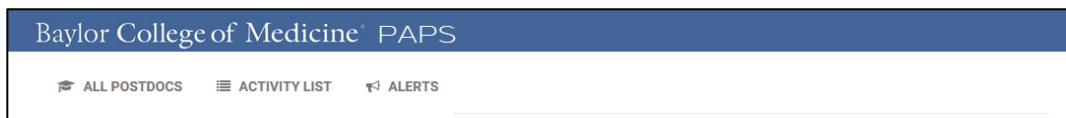
1 POSTDOC SYSTEM OVERVIEW

The Postdoc profile appears in the Postdoc Appointment Profile System (PAPS) after the postdoc has attended the BCM New Hire Orientation. An Alert will appear in the Alerts Section of the postdoc system, notifying the user that an action needs to be initiated in PAPS.


1. Log-in to system using your BCM login and PW <https://education.bcm.edu/gsbs/post-docs>.
2. The menu bar for the Postdoc Appointment Profile System (PAPS) has the following sections.



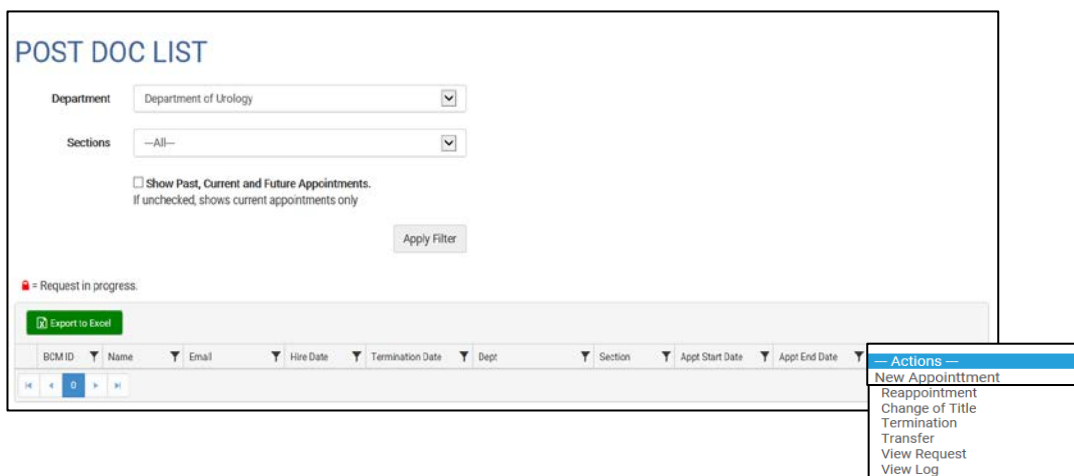
3. Postdoc Administrators have access to three areas of PAPS:
 - All POSTDOCS
 - ACTIVITY LIST
 - ALERTS



1.1 All Postdocs


The  All Postdocs section provide you a current and historical view of postdocs in your department. Under the All Postdocs section you can initiate different actions for the postdoc appointment. The different actions are:

- New Appointment
- Reappointment
- Change of Title
- Termination
- Transfer
- View Request
- View Log



1.2 ACTIVITY LIST



The  Activity List section is the workflow area of the system. After submitting the appointment request, the postdoc record moves to the Activity List section. PAPS opens in the Activity List Section. The Activity List section will show the Request Type, Current Status, and Pending Action of the postdoc record

- i. **Request Type** is the type of action initiated in the postdoc system. The different **Request Types** are:
 - [New appointment](#)
 - [Reappointment](#)
 - [Change of Title](#)
 - [Transfer](#)
 - [Termination](#)

- ii. **Current Status** refers to the different completed actions regarding the current postdoc appointment action. The **Current Statuses** are:
 - [Request Type: Appointment, Reappointment, Change of Title, Transfer, Transfer](#)
 - [OPA Approved](#)
 - [ISO Approved](#)
 - [Rejected](#)
 - [Approved](#)

- iii. **Pending Action** refers to the location of the record in the workflow process. The **Pending Actions** are:
 - [Pending OPA Review](#)
 - [Pending ISO Review](#)
 - [Pending HR Review](#)
 - [Final](#)

ACTIVITY LIST											
<input type="checkbox"/> Show Past, Current and Future Appointments. If unchecked, shows current appointments only											
Appt Request Id	Date Created	BCMID	Name	Department	Section	Request Type	Current Status	Pending Action	Date Certified	Appointment Start Date	
864	06/25/2018			Department of Pediatrics	Pediatrics-Nutrition	Reappointment	Reappointment	Pending OPA Review	06/26/2018	06/30/2017	i.
862	06/25/2018			Department of Neurology		Reappointment	Reappointment	Pending OPA Review	06/26/2018	09/05/2017	ii.
861	06/25/2018			Department of Neurology		Reappointment	Reappointment	Pending OPA Review		08/21/2017	iii.

1.3 Alerts



The Alerts section provides information regarding Actions the Postdoc Admin needs to initiate in PAPS for an active postdoc appointment. The different types of Alert Messages are:

- Active appointment not found – New Hire
- Active appointment not found – Reappointment
- Missing in SAP (Date Terminated: 17-Jun-2018)
- In SAP Non-Postdoc Title
- Transferred to (new department name)

ALERTS

NOTE: To archive please check the checkbox on the line item and click Update Archive Status.

Update Archive Status

Export to Excel

Alert Id	BCMID	Postdoc Name	Dept	Section	Message	Date	Dept Notified?	
6157			Department of Ophthalmology		Active appointment not found - Reappointment	05/30/2018	Yes	<input type="checkbox"/>
6158			Department of Molecular Physiology & Biophysics		Active appointment not found - Reappointment	05/30/2018	Yes	<input type="checkbox"/>
6159			Department of Pediatrics	Pediatrics-Hematology	Active appointment not found - New Hire	05/30/2018	Yes	<input type="checkbox"/>
6161			Center for Cell & Gene Therapy		Active appointment not found - Reappointment	05/31/2018	Yes	<input type="checkbox"/>

1.4 Locked Records

The red lock means the postdoc appointment is submitted and moving the workflow.

1. Contact the Office of Postdoctoral Affairs to make any changes to the record while the appointment request is in process.
2. No changes are allowed after the appointment request is finalized.

POST DOC LIST

Department:

Sections:

Show Past, Current and Future Appointments.
If unchecked, shows current appointments only


Apply Filter


Request in progress.








Export to Excel

BCM ID	Name	Email	Hire Date	Termination Date	Dept	Section	Appt Start Date	Appt End Date	Action
1			06/20/2018		Department of Psychiatry & Behavioral Sciences				— Actions —
			07/09/2018		TCH Based	TCH-Congenital Heart Service			— Actions —
			07/09/2018		Department of Pediatrics	Pediatrics-Infectious Diseases			— Actions —



1.5 Historical Appointment Review

View historical appointment information by clicking the  chevron next to the BCM ID.

1. Click on the  chevron and the dropdown appears listing the previous postdoc appointments.

		07/01/2005		Department of Molecular & Human Genetics		10/01/2016	09/30/2017	-- Actions --	
		12/13/2004		Department of Medicine	Medicine-Pulmonary	06/28/2015	06/27/2017	-- Actions --	
		08/13/2012		Department of Ophthalmology		03/13/2017	03/12/2018	-- Actions --	
		01/16/2006		TCH Based	TCH-Pedi Surgery	05/17/2019	05/17/2019	-- Actions --	
Start Date	End Date	Department Name	Section Name	Appointment Title					
05/17/2019	05/17/2019	TCH Based	TCH-Pedi Surgery	Postdoctoral Fellow					
05/18/2018	05/16/2019	TCH Based	TCH-Pedi Surgery	Postdoctoral Associate					
07/01/2017	05/17/2018	TCH Based	TCH-Pedi Surgery	Postdoctoral Associate					
07/01/2016	06/30/2017	TCH Based	TCH-Pedi Surgery	Postdoctoral Associate					
07/01/2015	06/30/2016	TCH Based	TCH-Pedi Surgery	Postdoctoral Associate					
03/17/2015	06/30/2015	Department of Pediatrics	Pediatrics-Oncology	Postdoctoral Associate					
03/17/2014	03/16/2015	Department of Pediatrics	Pediatrics-Oncology	Postdoctoral Associate					
10/21/2008	03/16/2014	Department of Pediatrics	Pediatrics-Hematology & Oncology	Postdoctoral Associate					
07/01/2008	10/20/2008	Department of Pediatrics	Pediatrics-Hematology & Oncology	Postdoctoral Associate					

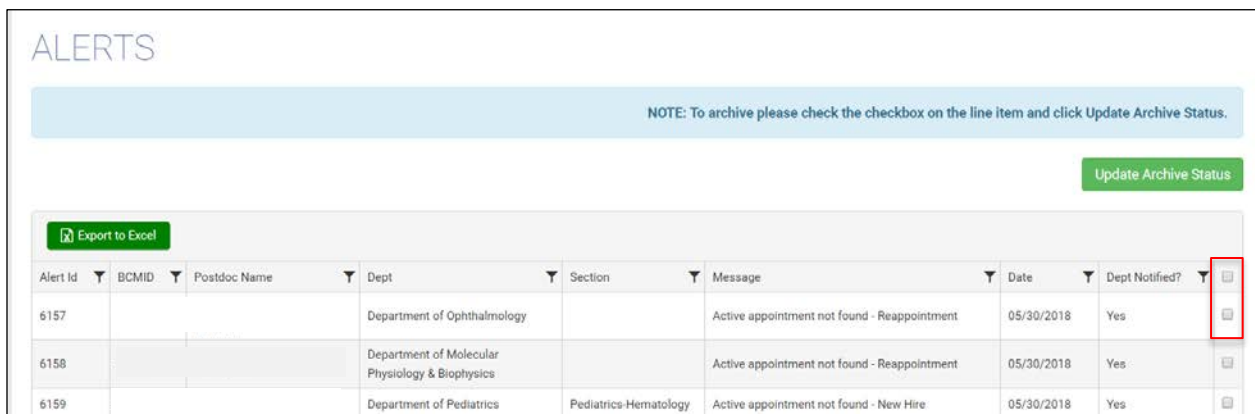
2 ALERTS

The  Alerts section provides a message about the current status of the postdoc appointment record. The Alert Message will notify the Postdoc Administrator of an Action that needs to occur in the  All Postdocs Section of PAPS.

There are five (5) different types of Alerts:



1. Active appointment not found – New Hire
2. Active appointment not found – Reappointment
3. Missing in SAP (Date Terminated:XX-Sep-2017)
4. In SAP Non-Postdoc Title
5. Transferred to (new department name)

Archive the Alert message by checking the box in the Archive column, after completing an Action. The Archive selection removes the alert message from the Alerts section and stops all email notifications. The alert message will reappear every 30 days, if a pending action has not occurred.




Alert Id	BCMID	Postdoc Name	Dept	Section	Message	Date	Dept Notified?	<input type="checkbox"/>
6157			Department of Ophthalmology		Active appointment not found - Reappointment	05/30/2018	Yes	<input type="checkbox"/>
6158			Department of Molecular Physiology & Biophysics		Active appointment not found - Reappointment	05/30/2018	Yes	<input type="checkbox"/>
6159			Department of Pediatrics	Pediatrics-Hematology	Active appointment not found - New Hire	05/30/2018	Yes	<input type="checkbox"/>

Note:

- The  Export to Excel to print a list of Alerts.
- The  Update Archive Status button removes the Alert notice after the action has been initiated in the system.

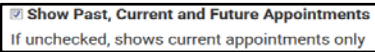
3 ALL POSTDOCS

Initiate all actions for new appointment, reappointment, change of title, transfer and/or terminations under the All Postdocs section for your department.

The  All Postdocs section displays current appointments only.

Note

If you do not find your postdoc's name, check the Show Past, Current and Future Appointments box



There are eight (8) actions you can initiate in the Postdoc System:

1. [New Appointment](#) – New Hire
2. [Termination](#) – Postdoc is leaving BCM


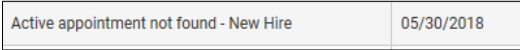

Dept	Section	Appt Start Date	Appt End Date	Action
Department of Psychiatry & Behavioral Sciences				<div style="border: 1px solid black; padding: 2px;"> -- Actions -- New Appointment Termination </div>
Department of Radiology		10/02/2017	10/01/2018	

3. [Reappointment](#)- Postdoc will be reappointed to the same department
4. [Change of Title](#)- a Postdoc's title is changed, generally due to changes in funding source
5. [Transfer \(New Appointment\)](#)– Postdoc ended appointment in one department and transferring new department
6. [View Log](#) – used to view notes entered by OPA, HR, or ISO and to see the actions taken for the postdoc appointment
7. [View Request](#) – to view last action initiated for the postdoc (New Appointment, Reappointment, Shortened Appointment, Change of Title, Termination)

Hire Date	Termination Date	Dept	Section	Appt Start Date	Appt End Date	Action
01/01/1993		Department of Molecular & Human Genetics		09/07/2018	09/06/2019	<div style="border: 1px solid black; padding: 2px;"> -- Actions -- Reappointment Change of Title Termination Transfer View Request View Log </div>
09/28/2015	09/28/2018	TCH Based	TCH-Pathology	09/05/2018	09/28/2018	
02/27/2017		Breast Center		09/10/2018	02/14/2019	



4 NEW APPOINTMENT

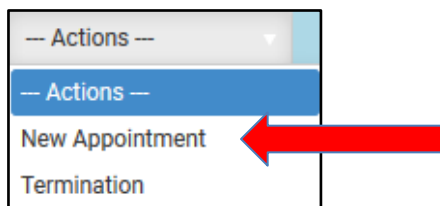
PAPS indicates a New Appointment in two ways:

- 1) A notification is displayed in the  Alerts section 
- 2) In the  All Postdocs section there are *no* dates in the Appt Start Date and Appt End date fields

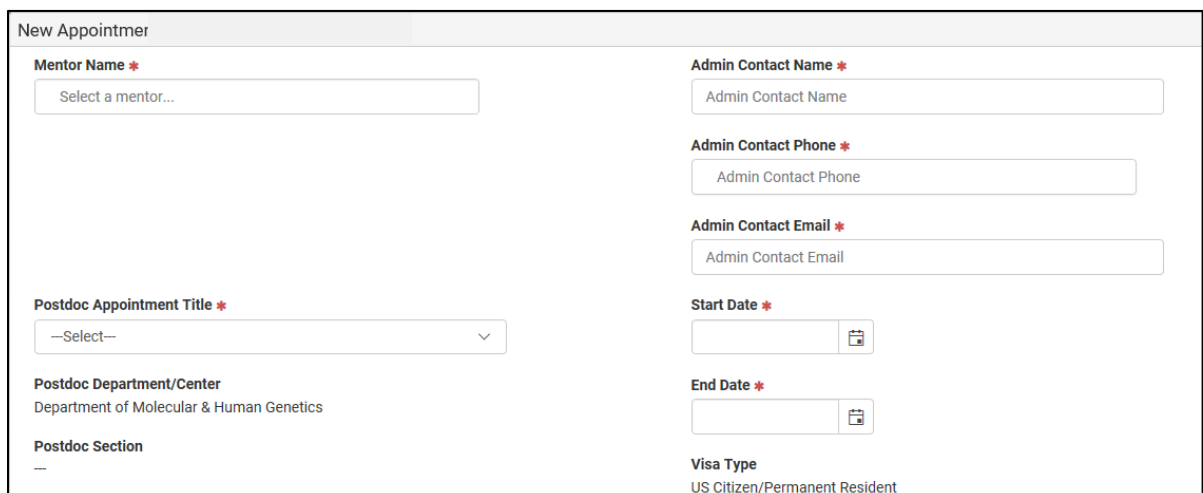


4.1 Initiate New Appointment Request

1. Locate your Postdoc in the  All Postdoc Section.
2. Click the Name filter 
3. Enter Postdoc's *Last Name, First Name*.
4. Go to the **Actions** dropdown.
5. Select New Appointment.



6. Complete all fields in the New Appointment request screen.




7. Enter Funding Source(s) as appropriate.

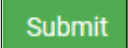
Note

- Provide a justification for appointments that are less than one year.

The screenshot shows a web form for appointment requests. Two red boxes highlight the text 'Justification for appointments' and 'of less than 1 year'. A blue box highlights a button labeled 'add another funding source'. Below this are two dropdown menus: 'SOURCE' with options 'BCM', 'BCM Affiliate', and 'Non-BCM'; and 'BCM AFFILIATE' with options 'CHI-St. Luke's', 'Harris Health', 'TCH', 'TIRR', 'UT', and 'VA'. To the right is a table with columns: 'TYPE OF FUNDING', 'BCM ACCOUNT #', 'FTE', 'STIPEND \$', and 'ACTION'. The 'TYPE OF FUNDING' dropdown is open, showing options like 'Federal', 'For Profit', 'Foreign Government', 'Internally Funded', 'Not for Profit', 'State Government', and 'Subaward/subcontract'. The 'FTE' field contains '0.00' and the 'STIPEND \$' field contains '0'. At the bottom right are 'save' and 'cancel' buttons.

Notes


- If more than one funding source is needed, click  for each additional funding source.
- FTE must equal 1.0

8. Click .
9. Obtain required signatures.
10. Attach **Signed Appointment Request** to the postdoc profile.
11. Next Steps – See [Section 5: Appointment Request Page](#).

Notes

- The Appointment Request Page will automatically download to your computer.
- The appointment screen will automatically close. If the appointment screen *does not* automatically close, check Red Highlighted areas for errors or incomplete fields.

The screenshot shows a form with four red error messages. The first is 'Admin Contact Name *' with a red border and the message 'Admin Contact Name is required'. The second is 'Admin Phone *' with a red border and the message 'Admin Phone is required'. The third is 'Admin Email *' with a red border and the message 'Admin Email is required'. The fourth is 'End Date *' with a red border and the message 'End Date is required'. There is also a 'Section' dropdown menu.

- After the appointment is  Submitted the Office of Postdoctoral Affairs receives the appointment request for processing.
- The Postdoc is notified via email to complete his/her Postdoc Profile.
- The following documents constitute a completed Postdoc Profile:
 - Current CV
 - Proof of terminal degree (diploma or transcript with the degree conferred)
 - Proof of HIPPA completion
 - Certifying of the Postdoc Profile
 - Signed Appointment Request

References

- See [Section 5: Appointment Request Page](#) – for detailed instructions to print the appointment request pages.
- See [Section 6: Attach Documents](#) – for detailed instructions to upload documents to the postdoc’s profile.
- See [Section 12.1: View Status of Request](#) – for detailed instructions to check the status of a postdoc’s appointment.

5 APPOINTMENT REQUEST PAGE


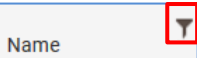

After the Postdoc Admin submits the appointment request, the Appointment Request page automatically downloads to the computer. If the Appointment Request page does not download, you can print the document in the Activity List section. The Signed Appointment Request page is attached to the postdoc's profile.

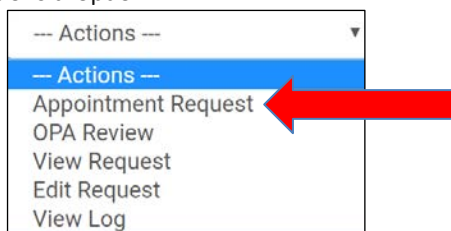
The following people must sign the Appointment Request Page:

- Postdoc
- PI or Mentor
- Department Chair or Center Director.

5.1 Locate and Print Appointment Request Page

If the Appointment Request does not download to your computer you can locate and print the **Appointment Request** form in the **Activity List** section.

1. Go to the  **Activity List** section.
2. Locate your Postdoc by clicking on the Name filter .
3. Enter the Postdoc's **Last Name, First Name**.
4. Go to the  Actions dropdown.
5. Select Appointment Request page from Actions dropdown .



Notes

- Under the **Activity List** section there is detailed information about the status of the postdoc's current appointment request.

ACTIVITY LIST										
<input type="checkbox"/> Show Past, Current and Future Appointments. If unchecked, shows current appointments only										
Appt Request Id	Date Created	BCMID	Name	Department	Section	Request Type	Current Status	Pending Action	Date Certified	Appointment Start Date
064	06/25/2018			Department of Pediatrics	Pediatrics-Nutrition	Reappointment	Reappointment	Pending OPA Review	06/26/2018	06/30/2017
862	06/25/2018			Department of Neurology		Reappointment	Reappointment	Pending OPA Review	06/26/2018	09/05/2017
861	06/25/2018			Department of Neurology		Reappointment	Reappointment	Pending OPA Review		08/21/2017

6. The Appointment Request downloads to your computer.
7. Print the Appointment Request to obtain required signatures.
8. Review the Appointment request to ensure that all of the information is accurate.
9. Obtain required signatures from the Postdoc, the Mentor/PI and Department Chair or Center Director.

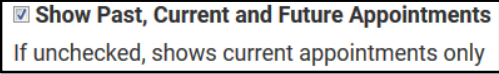
10. After signatures are obtained, attach the **Signed Appointment Request** page to the Postdocs Profile.
11. Next Steps – See [Section 6: Attach Documents](#).

6 ATTACH DOCUMENTS

1. Locate the Postdoc's profile in the  All Postdocs or the  Activity List sections.

2. Click the Name filter  and enter Postdocs *Last Name, First Name*.

Notes

- Check  the Show Past, Current and Future Appointments box if the search does not populate your Postdoc name.
- Repeat step #2.

3. Click the Postdoc's name.



Appt Request Id	Date Created	DCMID	Name	Department	Section	Request Type	Current Status	Pending Action	Date Certified	Appointment Start Date
864	06/25/2018	184467	Guthrie, Gregory	Department of Pediatrics	Pediatrics-Nutrition	Reappointment	Reappointment	Pending OPA Review	06/26/2018	06/30/2017

Note

- A new Tab will open for the Postdoc Profile page.

PERSONAL INFORMATION

EDUCATION HISTORY

POSTGRADUATE TRAINING

PUBLICATIONS

TEACHING EXPERIENCE

FELLOWSHIP/AWARDS

ATTACHMENTS

ADDITIONAL INFORMATION

CERTIFY

PERSONAL INFORMATION

Last Name *

First Name *

Middle Name

BCMID

Gender *

Female

Male

Date Of Birth *

4. Click **ATTACHMENTS** Attachments in right menu bar.
5. Select file to locate the saved document on your computer.
6. Search your computer for the saved Signed Appointment Request page.
7. Select Document Type, **Signed Appt Request**.
8. Click **Upload Document** Upload Document.

Postdocs seeking a new postdoc appointment must attach:

1. A current CV
2. Proof of terminal degree completion (e.g. copy of diploma, transcript indicating degree conferral)
3. Proof of completion of HIPAA training (completion certificate)

Postdocs seeking re-appointments, change in title or transfers must attach an updated CV.

Select File


Document Type **Upload Document**

Type	Date Uploaded	Action
CV		
Transcript: Terminal Degree	06/27/2018	<input type="button" value="X"/>
Diploma: Terminal Degree	06/26/2018	<input type="button" value="X"/>
HIPAA Certificate	06/26/2018	<input type="button" value="X"/>

9. The Signed Appointment Request will populate in the files chart, as indicated here:

Type	Title	Date Uploaded	Action
Signed Appt. Letter		11/21/2017	<input type="button" value="X"/>
HIPAA Certificate	General Compliance training 2017.pdf	11/15/2017	<input type="button" value="X"/>
CV	pdf	11/15/2017	<input type="button" value="X"/>
Transcript: Terminal Degree	PhD Degree.pdf	11/15/2017	<input type="button" value="X"/>
Signed Appt Request	Signature Page.pdf	11/13/2017	<input type="button" value="X"/>

1 - 5 of 5 items

10. Click  Next to save document and navigate from the Attachment Screen.

Notes

- Your Appointment request is now complete and ready for processing by OPA.

11. Close Postdoc Profile screen by closing the tab in your browser.
12. Next steps – See [Section 7: Appointment Letter](#).

Notes

- The Office of Postdoctoral Affairs will approve the request **after**:
 1. the Postdoc has certified his/her Profile,
 2. all required documents have been received from the postdoctoral trainee and postdoc administrator.
- After the Office of Postdoctoral Affairs has approved the Appointment Request, the postdoc record is moved in the workflow to HR and ISO (if foreign national or permanent resident) for approval.
- After the appointment request has received final approval by either OPA, ISO and/or HR, an email is generated to the Department.

Dear Postdoc Administrator

Please find attached an appointment letter for a postdoctoral trainee in your area. After verifying the letter and converting it to a PDF, please forward it to the trainee for their signature. The signed letter should be uploaded into the Postdoctoral Appointment system within 2 weeks.

If you have any questions, please contact the Office of Postdoctoral Affairs at PostdocAffairs@bcm.edu or 713-798-4475.

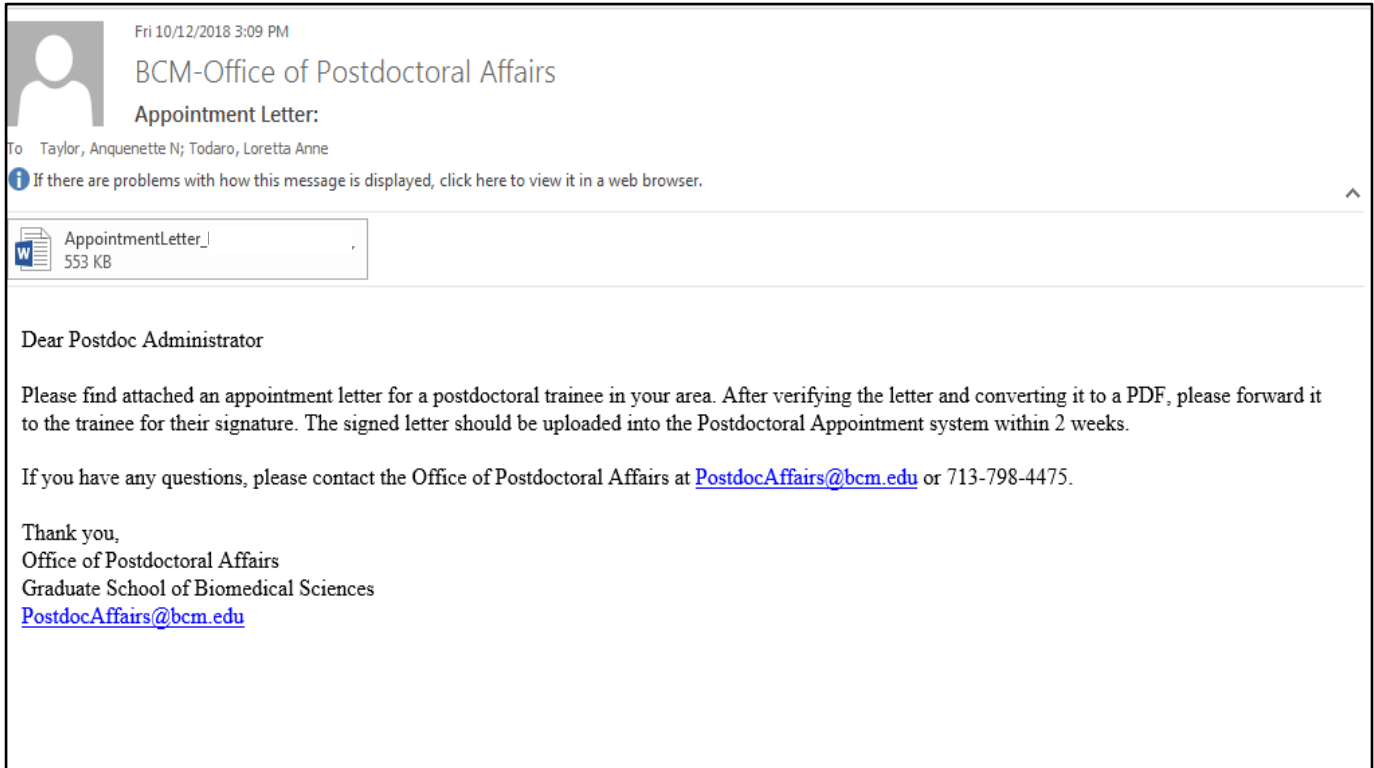
Thank you,
Office of Postdoctoral Affairs
Graduate School of Biomedical Sciences
PostdocAffairs@bcm.edu

7 APPOINTMENT LETTER

After the postdoc Appointment Request (New appointment, Reappointment, Transfer, or Change of Title) has moved through the workflow (Department/Center/Clinic, OPA, ISO or HR) then the Appointment Letter is ready for print.


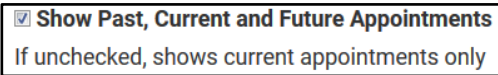
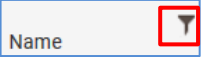
You can access appointment letters in two ways:

- 1) The Postdoc Admin and postdoc receive an automated email advising the Appointment Letter is ready for review and to be signed

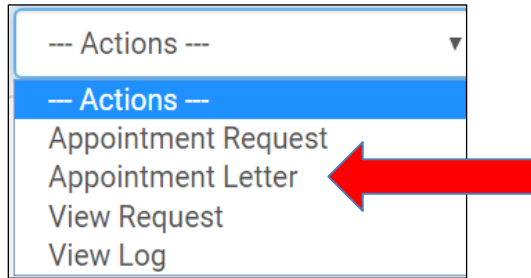


- 2) If the Appointment Letter is not received via email, the Postdoc Admin can locate and print the appointment letter

7.1 Locate and Print Appointment Letter

1. Go to the  Activity List section.
2. Click Show Past, Current, and Future Appointments . If unchecked, shows current appointments only.
3. Locate your Postdoc by clicking on the Name filter .
4. Enter Postdocs Last Name, First Name.

5. Go to Action dropdown, select Appointment Letter.




6. The Appointment Letter downloads to your computer.
7. Review information in the Appointment Letter for accuracy.
8. Save Appointment Letter as a .PDF file on your computer.
9. Email postdoc .PDF of Appointment letter for signature.
10. Upload the Signed Appointment Letter to the Postdoc's Profile.
11. Next Steps - See [Section 6: Attach Documents](#).

8 REAPPOINTMENT

The reappointment feature is to extend a Postdoc's appointment for another year.

A postdoc Reappointment is indicated in two ways:

- 1) In the  Alerts Section, there is a message

Message	Date	Dept Notified?
Active appointment not found - Reappointment	05/30/2018	Yes

.
- 2) The Postdoc Admin and postdoc receive an automated email advising the current postdoc appointment will end in 90 days.

8.1 Initiate Reappointment Request

1. Locate your Postdoc in the  All Postdoc section.
2. Click on Name filter .
3. Enter Postdocs *Last Name, First Name*.

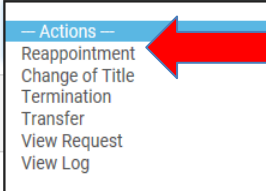
Note

- If the search does not populate your Postdoc record, click Show Past, Current and Future Appointments box

<input checked="" type="checkbox"/> Show Past, Current and Future Appointments If unchecked, shows current appointments only

- Repeat step #2.

4. Select **Reappointment** from the **Actions** drop-down menu

Hire Date	Termination Date	Dept	Section	Appt Start Date	Appt End Date	Action
01/01/1993		Department of Molecular & Human Genetics		09/07/2018	09/06/2019	
09/28/2015	09/28/2018	TCH Based	TCH-Pathology	09/05/2018	09/28/2018	
02/27/2017		Breast Center		09/10/2018	02/14/2019	

5. Complete all fields.
 - All fields will repopulate in the reappointment request from the previous appointment
6. Verify all funding sources and stipend amount is correct.

Reappointment

*** REQUIRED**

Current Appointment Start Date
31-Oct-2016

Current Appointment End Date
30-Oct-2017

Visa Type
US Citizen/Permanent Resident

Mentor Name *

Admin Contact Name *

Mentor BCMID

Admin Phone *

Mentor Email

Admin Email *

Mentor Department
Department of Molecular & Cellular Biology

Postdoc Appointment Title *
Postdoctoral Associate

Postdoc Department/Center
Breast Center

Section
—

Start Date *
31-Oct-2017

End Date *
30-Oct-2018

7. Enter Funding Source(s) as appropriate.


Note

- Justification should be provided for appointments less than one year.

Justification for appointments of less than 1 year

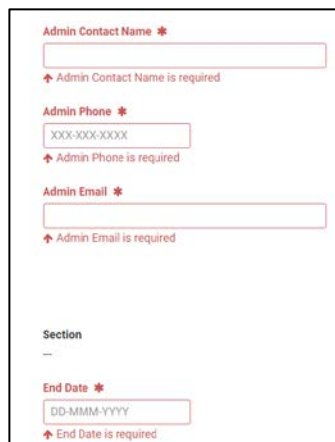
SOURCE	BCM AFFILIATE	TYPE OF FUNDING	BCM ACCOUNT #	FTE	STIPEND \$	ACTION
BCM	--Select--	Federal	<input type="text"/>	1.00	49858	<input type="button" value="x"/>
IARPA						
Total				1.00	49,858.00	

- If more than one funding source is needed, click for each additional funding source.

8. Click .
9. Obtain required signatures.
10. Attach Signed Reappointment Request to the postdoc profile.
11. Next Steps – See [Section 5: Appointment Request Page](#).


Notes

- The Appointment Request Page will automatically download to your computer.
- The appointment screen will automatically close. If the appointment screen *does not* automatically close, check for errors or incomplete fields highlighted in red.



The screenshot shows a form with the following fields and error messages:

- Admin Contact Name ***: A text input field with a red border and the message "Admin Contact Name is required" below it.
- Admin Phone ***: A text input field containing "XXX-XXX-XXXX" with a red border and the message "Admin Phone is required" below it.
- Admin Email ***: A text input field with a red border and the message "Admin Email is required" below it.
- Section**: A dropdown menu with a red border and a red dash below it.
- End Date ***: A date input field containing "DD-MMM-YYYY" with a red border and the message "End Date is required" below it.

- After the appointment is  Submitted the Office of Postdoctoral Affairs receives the appointment request for processing.
- The Postdoc is notified via email to recertify and update his/her Postdoc Profile.
- The following documents constitute a completed Postdoc Profile:
 - Current CV
 - Updated Postdoc Profile
 - Re-certify profile
 - Signed Reappointment Request

References

- See [Section 5: Appointment Request Page](#) – for detailed instructions to print the appointment request pages.
- See [Section 6: Attach Documents](#) – for detailed instructions to upload documents to the postdoc’s profile.
- See [Section 12.1: View Status of Request](#) – for detailed instructions to check the status of a postdoc’s appointment.

9 TRANSFER

The **Transfer Request** is for appointing a postdoc who remains at BCM but continues the appointment in a new lab/department/ clinic or PI. The new department initiates the transfer request.

1. Locate your Postdoc on your  All Postdoc section.
2. Click on Name filter .
3. Enter Postdocs Last Name, First Name.
4. Select **Transfer** from the Action Dropdown menu.

	Appt Start Date	Appt End Date	Action
	07/01/2016	02/08/2017	-- Actions --
ology	09/05/2018	09/27/2018	-- Actions -- Reappointment Change of Title Termination Transfer View Request View Log
	02/15/2018	02/14/2019	
	09/07/2017	09/06/2018	
	11/09/2017	11/08/2018	-- Actions --

5. Complete all fields.

Notes

- The End date will remain the current appointment end date to ensure the postdoc's paid time off balances (vacation and sick time) do not restart.

Transf

<p>Current Appointment Start Date Friday, September 7, 2018</p> <p>Mentor Name * Select a mentor...</p>	<p>Current Appointment End Date Friday, September 6, 2019</p> <p>Admin Contact Name * [Text Field]</p> <p>Admin Contact Phone * Admin Contact Phone [Text Field]</p> <p>Admin Contact Email * [Text Field]</p>
<p>Current Appointment Title Postdoctoral Associate</p> <p>Postdoc Appointment Title * Postdoctoral Associate [Dropdown]</p> <p>Postdoc Department/Center Department of Molecular & Human Genetics</p> <p>Postdoc Section --</p> <p>Justification for appointments of less than 1 year [Text Area]</p> <p>Add Another Funding Source</p>	<p>Transfer Date * [Calendar Icon]</p> <p>End Date * 9/6/2019</p> <p>Visa Type</p>

Justification for appointments of less than 1 year

Add Another Funding Source

SOURCE	BOM AFFILIATE	TYPE OF FUNDING	BOM ACCOUNT #	FTE	STIPEND \$	ACTION
--Select--	--Select--	--Select--				
Funding Description (e.g. NIH R01 grant, fellowship, etc)						
Total				0.00	0.00	

6. Click .
7. The Postdoc **Transfer** request downloads to the computer.
8. Obtain required signatures.
9. Attach signed **Transfer** request to the Postdoc's profile.
10. Next Step – See [Section 6: Attach Documents](#).

Notes

- The transfer request screen automatically closes. If the appointment screen does not automatically close, check for errors or incomplete fields.
- After the **Transfer Request** is submitted:
 - The Appointment Request Page for Transfers downloads for approval.
 - If the appointment request does not automatically download See [Sections 5.1: Locate and Print Appointment Request Page](#).
- The Office of Postdoctoral Affairs receives your request for processing.
- The Postdoc is notified via email to complete and update his/her Postdoc Profile.
- The following documents and actions constitute a completed Postdoc Profile:
 - Current CV
 - Updated Postdoc Profile
 - Re-certify of postdoc
 - Signed Transfer Appointment Request

References

- See [Section 5: Appointment Request Page](#) – for detailed instructions to print the appointment request pages.
- See [Section 6: Attach Documents](#) – for detailed instructions to upload documents to the postdoc's profile.
- See [Section 12.1: View Status of Request](#) – for detailed instructions to check the status of a postdoc's appointment.

10 CHANGE OF TITLE

The **Change of Title** is used when a Postdoc's title is changed, generally due to changes in funding source.

1. Locate Postdoc in the  All Postdoc section.
2. Click on Name filter .
3. Enter Postdocs **Last Name, First Name**.

Notes

- If the search does not populate your Postdoc record, click Show Past, Current and Future Appointments box

Show Past, Current and Future Appointments
If unchecked, shows current appointments only

- Repeat step #2.

4. After locating your Postdoc, select **Change of Title** from the **Actions** drop-down menu.

Hire Date	Termination Date	Dept	Section	Appt Start Date	Appt End Date	Action
01/01/1993		Department of Molecular & Human Genetics		09/07/2018	09/06/2019	<ul style="list-style-type: none"> Reappointment Change of Title Termination Transfer View Request View Log
09/28/2015	09/28/2018	TCH Based	TCH-Pathology	09/05/2018	09/28/2018	
02/27/2017		Breast Center		09/10/2018	02/14/2019	


5. Complete all fields.
6. Select New Postdoc Appointment Title.

Change of Title

<p>Current Appointment Start Date Thursday, November 26, 2015</p> <p>Current Appointment Title Postdoctoral Associate</p> <p>Postdoc Appointment Title * --Select--</p> <p>Postdoc Department/Center Department of Medicine</p> <p>Postdoc Section Medicine-Endocrinology</p> <p>Justification for appointments of less than 1 year</p>	<p>Current Appointment End Date Sunday, May 22, 2016</p> <p>Start Date * <input type="text"/></p> <p>End Date * 5/22/2016</p> <p>Visa Type H1 (Temporary Workers and Trainees: Specialty Occupations H1B1, H1B2, H1B3, H1C)</p>
---	---

7. Enter Funding sources

- If more than one funding source is needed, click  for each additional funding source.

8. Click .
9. The Postdoc Change of Title Request downloads to the computer.
10. Obtain required signatures.
11. Attach signed Change of Title Request to the Postdoc's profile.

Notes

- The Change of Title request screen automatically closes. If the appointment screen does not automatically close, check for errors or incomplete fields.
- After the Change of Title is submitted:
 - The Appointment Request Page for Change of Title downloads for approval.
 - If the appointment request does not automatically download See [Sections 5.1: Locate and Print Appointment Request Page](#).
- The Office of Postdoctoral Affairs receives your request for processing.
- The Postdoc is notified via email to complete and update his/her Postdoc Profile.
- The following documents and actions constitute a completed Postdoc Profile:
 - Current CV
 - Updated Postdoc Profile
 - Re-certification of postdoc
 - Signed **Change of Title** appointment Request

References

- See [Section 5: Appointment Request Page](#) – for detailed instructions to print the appointment request pages.
- See [Section 6: Attach Documents](#) – for detailed instructions to upload documents to the postdoc's profile.
- See [Section 12.1: View Status of Request](#) – for detailed instructions to check the status of a postdoc's appointment.

11 TERMINATION

Use termination a postdoc's appointment has ended and the postdoc is leaving Baylor College of Medicine. Review the [Research Postdoc Policies](#) regarding termination process and reasons. Terminate all postdocs in PAPS and SAP. Provide postdocs at least two months (60-days) written notice if their appointment terminates due to the following reason:

- 1) expiration of appointment,
- 2) termination for financial exigency,
- 3) termination for non-performance and
- 4) promotion.

Attach the termination or resignation letter to the postdoc's profile.

If the postdoc resigns from the appointment 60-days written notice is not required. It is recommended that the postdoc provide a minimum of two-weeks' notice in for rehire by BCM any time in the future.

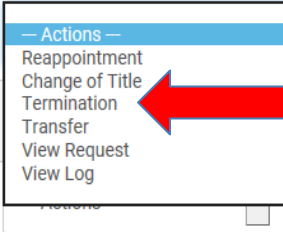
1. Locate the Postdoc in the  All Postdoc section.
2. Click on Name filter .
3. Enter Postdocs ***Last Name, First Name***.

Note

- If the search does not populate your Postdoc record, click Show Past, Current and Future Appointments box

Show Past, Current and Future Appointments
If unchecked, shows current appointments only

- Repeat step #2.
4. Click on the Postdoc's Name.
 - Postdoc's profile opens.
5. Click Attachments.
 - Attach *resignation or termination* letter to the Postdoc's profile, see [Section 6: Attach Documents](#).
6. Return to All Postdoc's section.
7. Select Termination from the Actions drop-down menu.

Hire Date	Termination Date	Dept	Section	Appt Start Date	Appt End Date	Action
01/01/1993		Department of Molecular & Human Genetics		09/07/2018	09/06/2019	
09/28/2015	09/28/2018	TCH Based	TCH-Pathology	09/05/2018	09/28/2018	
02/27/2017		Breast Center		09/10/2018	02/14/2019	

8. Complete both tabs:
 - i. Alumni Profile Information
 - ii. Termination Request
9. Complete all fields with information about the postdoc's research while at BCM.
10. Check box if Research Project at BCM is Cancer Related.

The screenshot shows a web form titled "Termination:". It has two tabs: "Termination Request" and "Training Grant Profile". Red arrows point to these tabs, labeled "ii." and "i." respectively. Below the tabs are several input fields: "Updated on", "eraCommons ID", "BCM Email *" (with the value "xianggus@bcm.edu"), "Other Email (e.g. gmail)", "Topic of Research Project *" (with a red arrow labeled "8." pointing to it), and "Is Research Project Cancer Related?" (with a red arrow labeled "9." pointing to the checkbox).

11. Complete Next Position After Termination BCM Postdoc.

The screenshot shows a form titled "Next Position After Termination BCM Postdoc". It contains several dropdown menus and text input fields: "Position Start Month *" (dropdown), "Position Start Year *" (dropdown), "Position Description *" (dropdown), "Other Position Description *" (text input), "Department or Program (If applicable)" (text input), "Institution or Company *" (text input), "Type of Institution or Company Type *" (dropdown), and "Position Activity *" (dropdown).

12. Complete Alumni Contact Information.

- This information is very important.
- Please take the time to request the updated information from the postdoc.

Most Recent Contact Information

Personal Email *

Address *

City *

Address *

Phone Number *

Linked In Profile URL *

Save Cancel

13. Complete Termination Request.

- Enter Date Written Notice of Termination provided to Postdoc.
- Enter Termination Date.
- Select Termination reason.
- Attach supporting documents to Postdoc's profile (e.g. letters of Termination/Resignation) – See [Section 6: Attach Documents](#).

Termination Request: Training Grant Profile

Current Appointment Start Date: Friday, July 20, 2018

Current Appointment End Date: Monday, December 31, 2018

Department: Department of Pharmacology and Chemical Biology

Section: ---

Hire Date: ---

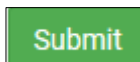
Date Written Notice of Termination provided to Postdoc: 9/20/2018

Termination Date: 10/28/2018

Reason: Other Employment

Cancel

14. Click




Notes

- As a College who receives federal funding, BCM is required to report on outcomes of all of current and past Postdocs.
- The Office of Postdoctoral Affairs will not process the termination request if the Alumni Profile is not complete.

11.1 Termination Questions

1. Have you completed your Postdoc Profile and updated your publications?
2. What is your eraCommons' ID Number (if available)
3. Alternate Email address
4. Topic of Research Dissertation Project
5. After leaving BCM, will you work for an Institution or Company?
6. What is the name of the Company/Institution? (Please include the Department name)
7. What type of position (Clinical Research Fellow/Resident, Research Scientist (Non-Faculty), Faculty (Tenure-Track), Faculty (Other, Instructor, Adjunct), Clinical Staff/Private Practice, Unknown, Unemployed, Other)?
8. What type of work will you conduct?
 - Further education or training
 - Teaching
 - Research
 - Administration
 - Clinical Practice
 - Law
 - Business
 - Unknown
 - Other (Please specify)
9. When will you begin this new position or training (MM/YY)?
10. Do you have a LinkedIn Profile?
11. Have you received any subsequent funding?
12. If so, please provide the following:
 - Grant Number:
 - Award Description
 - Sponsor
 - Your Role (PI, CoPI, Faculty/Collaborator, Staff Scientist)
 - Year Awarded

12 View Status, Activity Log and Current Request

The Postdoc Appointment System includes a workflow to inform all administrative users (Postdoc Admins, OPA, HR and ISO) about the [Appointment Status and Pending Action](#) of the postdoc’s appointment. Postdoc system users can view status of the Appointment Request any time by viewing the  **ACTIVITY LIST** Activity List and searching by the postdoc’s name or BCM ID. The Pending Action Column will reflect one of the following statuses:

Pending OPA Review	Pending ISO Review	Pending HR Review	Approved	Rejected	Final
--------------------	--------------------	-------------------	----------	----------	-------

12.1 View Status of Request

You can view the status of the current request in the Activity Section.

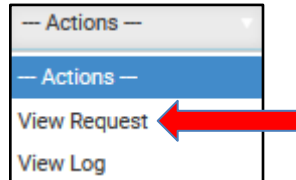
- **Request type** indicates the type of request the PD Admin has initiated in the system (New appointment, reappointment, change of title, transfer, termination).
- **Current Status** indicates the last action performed in the workflow OPA Approved, ISO Approved, Approved, Rejected.
- **Pending Action** indicates the action initiated on the current request, for example, Pending OPA Review, Pending HR Review, Pending ISO Review, and Final. Final indicates that the workflow is completed.

Request Type ▼	Current Status ▼	Pending Action ▼	Date Certified ▼	Appointment Start Date ▼
Reappointment	Reappointment	Pending OPA Review	06/28/2018	10/10/2017
New	OPA Approved	Pending HR Review	03/23/2018	08/17/2016
Change of Title	Rejected	Final		02/13/2018
Termination	Rejected	Final		03/05/2018
Reappointment	Rejected	Final		04/03/2017
Reappointment	Approved	Final		06/27/2018
Reappointment	OPA Approved	Pending ISO Review	06/15/2018	09/11/2017

12.2 View Request

View Request is to review details of completed and pending requests.

1. Go to the Actions Dropdown menu.
2. Select View Request.



Reappointment:


Current Appointment Start Date Tuesday, October 10, 2017	Current Appointment End Date Tuesday, October 9, 2018
Mentor Name * <input type="text"/>	Admin Contact Name * <input type="text"/>
Mentor BCMID	Admin Contact Phone * <input type="text"/>
Mentor Email <input type="text"/>	Admin Contact Email * <input type="text"/>
Mentor Department Department of Molecular & Cellular Biology	Start Date * 10/10/2018 <input type="text"/>
Current Appointment Title <input type="text"/>	End Date * 10/9/2019 <input type="text"/>
Postdoc Appointment Title * Postdoctoral Associate <input type="text"/>	Visa Type J1 (Exchange visitors)
Postdoc Department/Center Department of Molecular & Cellular Biology	
Postdoc Section --	

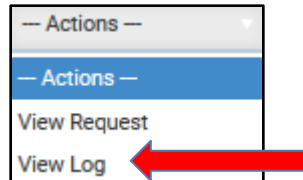
Justification for appointments of less than 1 year

SOURCE	BCM AFFILIATE	TYPE OF FUNDING	BCM ACCOUNT #	FTE	STIPEND \$	ACTION
BCM <input type="text"/>	--Select-- <input type="text"/>	State Government <input type="text"/>	<input type="text"/>	1.00 <input type="text"/>	49118 <input type="text"/>	<input type="button" value="*"/>
<input type="text"/>						
Total				1.00 <input type="text"/>	49,118.00 <input type="text"/>	

12.3 View Log

View Log is to review all activity that has happened with an appointment. The activity log tracks date and time information, notes and approval and rejected decisions by PAPS users. It provides more in-depth information regarding the status of the appointment request,

1. Go to the  Activity List.
2. Locate the Actions dropdown menu.
3. Select View Log.



NOTES

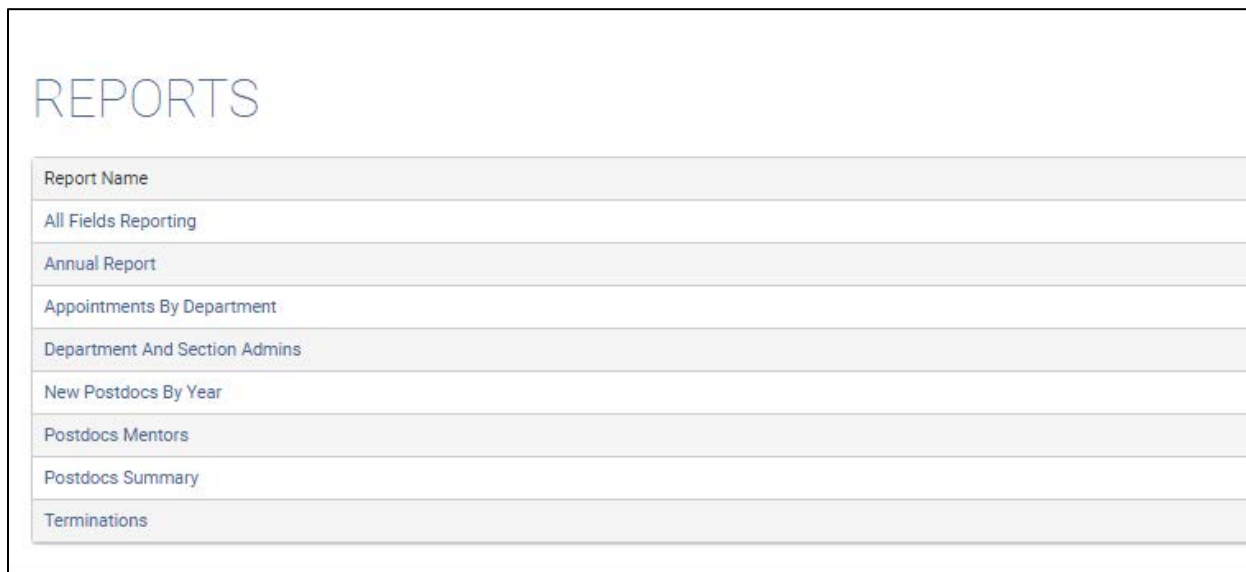
- Below is an example of the type of information provided in the Activity Log.


Activity Log:	
Current Status	Final
Action Taken	Approved
Decision Date	Monday, June 25, 2018 @ 12:31 PM
Decision Made By	Leslie Coward
Comments	OPA initiated and approved appointment. Requested 2017 signed appointment letter from department.
Current Status	Pending OPA Review
Action Taken	Reappointment
Decision Date	Monday, June 25, 2018 @ 12:27 PM
Decision Made By	Leslie Coward
Comments	

- Changes to an appointment request are not allowed at the department/clinic level after the request has been submitted/completed.
- Contact the Office of Postdoctoral Affairs to make any changes after a record is submitted for approval.

13 REPORTS

The Postdoc Appointment System has a reporting tool. Users in the Graduate School of Biomedical Sciences and the Office of Postdoctoral Affairs can create and export reports to excel.



1. Go to the  Reports section.
2. Select type of Report, See Different Types of Reports for report descriptions.
 - The report opens in a new tab
3. The report can be exported in the following formats: .CSV, MS Excel or saved as a .PDF.


13.1 Types of Reports

1. **All Fields Report.** A report containing information from the postdoc appointment and postdoc profile.
2. **Annual Report.** An overview of appointments that occurred during an AY. The report contains information by department, diversity, and publication data.
3. **Appointment by Department.** A report of historical postdoc appointments, with limited demographic information, mentor, and contact information.
4. **Department and Sections Admins.** A report of current postdoc admins with contact information in PAPS.
5. **New Postdocs By Year.** Report provides a total of the number of new postdocs appointment in an AY.
6. **Postdocs Mentors.** A report of all mentors and a link to view current and historical postdocs appointments.
7. **Postdocs Summary.** A snapshot of current, active postdocs in PAPS.
8. **Terminations.** A report to search PD terminations by date range.

14 DEPARTMENT ADMINS

The Department Admins Section is available for the PAPS Administrator to update department chair and administrative staff contacts. OPA can grant new postdoctoral administrative staff access to create postdoctoral appointment requests. The names in this section will appear on the postdoctoral appointment letters.



1. Go to the  Department Admins section.
2. Select Department.
 - If there is subsection, select Section from drop down.
 - If needed, update Chair or Center Director of the Department.

Baylor College of Medicine PAPS

ALL POSTDOCS ACTIVITY LIST ALERTS **DEPARTMENT ADMINS** APPLICATION SECURITY REPORTS

MANAGE DEPARTMENT

Department

Section

DEPARTMENT CHAIR

Title *

Name *


DEPARTMENT/SECTION ADMINS

3. Click Add New Admin.

DEPARTMENT/SECTION ADMINS

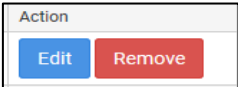

ECA	Name	Email	Phone	Use on Appt Letter
e		ar		No

4. Enter Admin's ECA.
 - The ECA can be found on the BCM Intranet under Find a Person
5. Click Go.

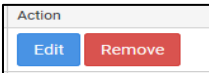

6. Enter Telephone Number.
7. Check Use On Appointment Letter if the postdoc administrator will be added to the appointment letter.
8. Click .

14.1 Edit and Remove PD Admins

14.1.1 Edit Department Admin Contacts

1. Click the edit  button to update Postdoc Admins contact information.
2. Click  to save changes.

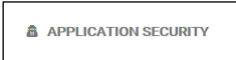
14.1.2 Remove Department Contacts

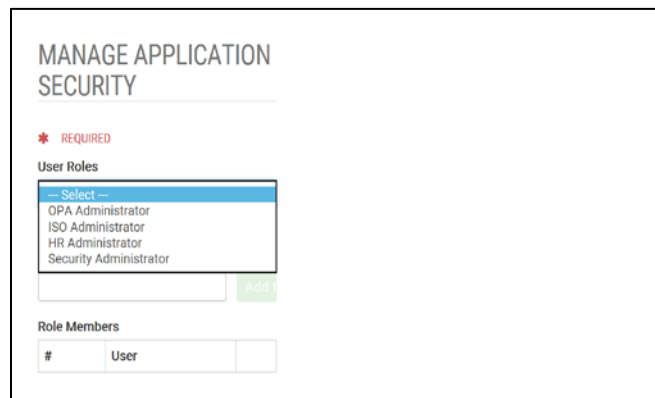
1. Click the Remove  button to delete Postdoc Admins contact information.
2. Click  to save changes.

15 Application Security

Application Security provides different access levels to PAPS. Application Security allows you to update Administrator Security users in the four different roles the Postdoc Appointment system has the following Security User Roles:

- Office of Postdoctoral Affairs – OPA Administrator
- International Services Office - ISO Administrator
- BCM Human Resources – HR Administrator
- The Graduate School of Biomedical Sciences – Security Administrator

1. Go to the Application Security section .
2. Select User Role from the drop down.



MANAGE APPLICATION SECURITY

* REQUIRED

User Roles

-- Select --

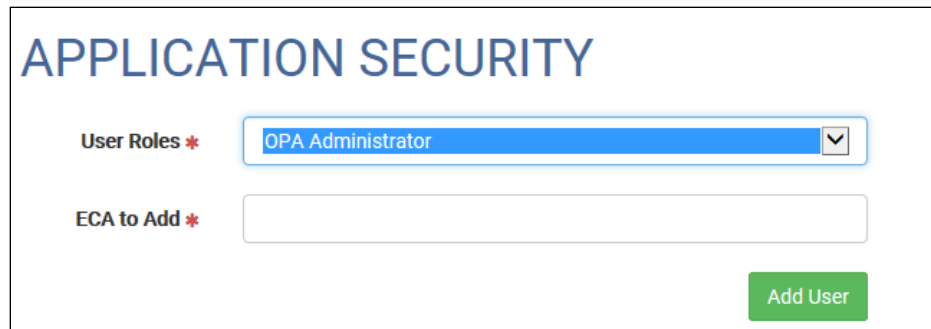
- OPA Administrator
- ISO Administrator
- HR Administrator
- Security Administrator

Add

Role Members

#	User	

3. Enter ECA.



APPLICATION SECURITY

User Roles * OPA Administrator

ECA to Add *

Add User

4. Click Add User.