Processing Postdoctoral Appointments in UGAJobs: A Guide for Unit HR Administrators

Roles

- **Hiring Unit** – UGA unit responsible for creating, hiring and managing the postdoc position.
- **Hiring Unit’s Reporting Dean/VP Office** – Dean or VP Office to which the hiring unit reports and from which the hiring unit obtains applicable approvals.
- **Sponsored Office/Office of Postdoctoral Affairs** – The Office of Postdoctoral Affairs (OPA) acts as the Sponsored Office within UGAJobs and must review and approve all postdoctoral position requests, postings (direct hire/internal and searches) and hiring proposals.
- **Central HR** – Upon OPA’s approval, OPA staff will submit the requests to Central Human Resources for their review and approval.

Key Points

- **Effective December 16, 2018**, all postdoctoral positions will be processed and managed through UGAJobs using the **Grad/Research/Student/Temp position type**.
- Check with your Dean/VP Office on the UGAJobs approval routing required within your college for new postdoc positions, postings and hiring proposals. Research Mentors/PIs/Supervisors are responsible to ensure they have applicable unit approval to create and appoint to a postdoctoral position.
- **Important**: The checklist and visual/flowchart instructions on the following pages outline the basic steps to appoint/hire a postdoc in UGAJobs and only gives specific instructions for Office of Postdoctoral Affairs policy and procedure. Please make sure to check with your unit and college for any internal procedures and **Human Resources** for any general UGA employment requirements and **Office of International Education-Immigration Services** (if applicable) regarding visa-related issues.
- Technical instructions and assistance for UGAJobs may be located through the **UGAJobs Training Library** or you may contact UGA **Central HR staff members assigned to your unit**.

In This Guide

- See pages 2-5 for the checklist/instructions in text form.
- See pages 6-10 for the visual/flowchart instructions.
- Office of Postdoctoral Affairs suggests reviewing both forms of instructions.
1. ASSIGN OR REQUEST CREATION OF A POSTDOC POSITION:

Important Points:

- Each postdoc is assigned to a position. There are three postdoc position BCATS that have specific descriptions and criteria.
- *The Summary Table of Postdoctoral Research Position Details* (located [here](#) on page 2) may assist you in determining which BCAT you should select. After reviewing the table, please contact opa@uga.edu if you are unsure which BCAT you should use.

Instructions:

1. **Hiring Unit initiates position request in UGAJobs:**
   a. If an appropriate postdoc position is available/vacant, the hiring unit can use the Modify or Evaluate actions to make any needed changes to the position.
   b. If a vacant position is not available, the hiring unit should create and submit a New Position Description request in the Grad/Research/Temp/Student position type within UGAJobs.
   c. **IMPORTANT OPA Policy:** The Duties/Responsibilities section of a postdoc position request is required and must be completed.

2. **Hiring Unit should submit the position request through the appropriate approval routing within the hiring unit and the reporting college/VP office.**
   a. Dean/VP Offices should communicate to their units the approval routing that is required for postdoc position requests.
   b. Position requests that skip necessary approval routing risk processing delay.

3. **Upon appropriate approval routing within the unit and college, the position request should be routed to “Sponsored Office” (which is OPA) by the last person in the hiring unit-Dean/VP Office approval path.**
   a. Select “Submit to Sponsored Office”.
   b. Select one of the OPA staff members. A list of OPA staff members can be found [here](#). **IMPORTANT:** Please make sure to send to one of the OPA staff members. The dropdown includes names that are not OPA staff members; these are for OPA use only.

4. **OPA will review the position request.**
   a. If there are no issues or questions, then OPA will approve and send forward to Central HR.
   b. If there are any questions or items to correct, OPA will either contact the Initiator of the request or send the position request back for corrections.
2. REQUEST TO POST THE POSTDOC POSITION:

Important Points:

- Once the postdoc position has been approved, a posting is required to proceed.
- A posting is required even for direct hires. (A search for postdoc positions is optional.)

Instructions:

1. Hiring Unit initiates posting request in UGAJobs:
   a. **IMPORTANT** - Include in the comments section if the posting is for a search or a direct hire so that OPA can determine the correct routing for the posting request. (See 4a and 4b. below for more details.)

2. Hiring Unit should submit the posting request through the appropriate approval routing within the hiring unit and the reporting college/VP office.
   a. Dean/VP Offices should communicate to their units the approval routing that is required for postdoc posting requests.
   b. Postings that skip necessary approval routing risk processing delay.

3. Upon appropriate approval routing within the unit and college, the posting request should be routed to “Sponsored Office” (which is OPA) by the last person in the hiring unit-Dean/VP Office approval path.
   a. Select “Submit to Sponsored Office”.
   b. Select one of the OPA staff members. A list of OPA staff members can be found [here](#). **IMPORTANT:** Please make sure to send to one of the OPA staff members. The dropdown includes names that are not OPA staff members; these are for OPA use only.

4. Posting approval:
   a. Direct hire - OPA will submit directly for internal posting and send the contact for the Unit the internal link for the candidate. (**IMPORTANT OPA Policy** – make sure the offer letter has been reviewed and approved by OPA before presenting it to the candidate. See next step in this checklist.)
   b. Search - OPA will review and submit to HR for posting on the UGA job board.

3. SEND DRAFT OFFER LETTER TO OFFICE OF POSTDOCTORAL AFFAIRS (OPA) FOR REVIEW **BEFORE** PRESENTING IT TO THE CANDIDATE:

- Determine if the offer will be open-term or defined-term and then use the appropriate postdoc offer letter template. Templates can be found [here](#).
- See the [postdoc policy](#) for details on open-term and defined-term offers.
- Email the draft to opa@uga.edu.
- **IMPORTANT OPA Policy:** If the offered salary is 10% above the corresponding level on the [NIH NRSA Postdoc Stipend Levels](#) scale for the candidate’s years of experience, then a salary justification must accompany the offer letter draft. (**The NIH NRSA stipend levels are subject to change by fiscal year. Check that you are using the most current scale.**)
- See page 4 of this document if the unit would like to extend an offer and process the HP for a candidate that has not yet completed all Ph.D. requirements: [A Practical Guide to Managing UGA Postdoctoral Positions: Instructions and FAQs](#)

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4. COLLECT APPOINTMENT DOCUMENTS REQUIRED IN HP:

Instructions:

1. Hiring Unit should collect the required appointment documents:
   a. IMPORTANT OPA Policy – Postdoc HPs require appointment documents, which are the Postdoc Hiring Proposal Cover Form and the additional items in the checklist (listed at the bottom of the form).
   b. IMPORTANT – If the position is for a Postdoctoral Associate AC – BCAT 206X00 (Research and Teaching), which can teach a course(s) as Instructor of Record, then additional HP requirements will apply:
      i. Official transcripts must be submitted directly to the Office of Faculty Affairs (OFA). If electronic, emailed to ofatranscripts@uga.edu.
      ii. The Postdoc Hiring Proposal Cover Form requires the signature of the Department Head and Dean affirming that the candidate is approved to occupy a teaching position in the unit.
      iii. The Hiring Proposal will be routed by Office of Postdoc Affairs (OPA) to the Office of Faculty Affairs (OFA).
      iv. Hiring Proposals must reach the Office of Faculty Affairs 30 days prior to the date of appointment.
      v. Additional Requirement outside of UGAJobs: You may contact the Office of Faculty Affairs (OFA) for the Instructor of Record Credentialing process for these positions.

5. SUBMIT HIRING PROPOSAL (HP) in UGAJobs:

Once a candidate to fill the position has been identified, a Hiring Proposal for the candidate should be created from the posting.

Instructions:

1. Hiring Unit initiates the HP in UGAJobs:
   a. Upload the required appointment documents.
   b. OPA prefers that these documents are uploaded as one PDF file if the unit is able.
   c. HPs that do not contain the required documents risk processing delay.

2. Hiring Unit should submit the HP through the appropriate approval routing within the hiring unit and the reporting college/VP office:
   a. Dean/VP Offices should communicate to their units the approval routing that is required for postdoc HPs.
   b. HPs that skip necessary approval routing risk processing delay.

3. Upon appropriate approval routing within the unit and college, the HP should be routed to “Sponsored Office” (which is OPA) by the last person in the hiring unit-Dean/VP Office approval path:
   a. Select “Submit to Sponsored Office”.
   b. Select one of the OPA staff members. A list of OPA staff members can be found [here](#). IMPORTANT – Please make sure to send to one of the OPA staff members. The dropdown includes names that are not actually OPA staff members and those are for OPA use only.
4. **OPA will review the HP.**
   a. If there are no issues or questions, then OPA will approve and send forward to Central HR. (In the case of a Postdoc Associate AC, 206X00, OPA will send forward to the Office of Faculty Affairs for review.)
   b. If there are any questions or items to correct, OPA will either contact the Initiator of the request or send the HP back for corrections.

5. **Central HR will finalize the hire.**
   a. Central HR will determine background investigation requirements.
   b. Candidate should follow instructions from BI vendor that should come via email.
   c. Hiring unit should work with Central HR if there are any changes needed or issues with the HP or hire.

**Other resources:**

- [Policy for Postdoctoral Research Appointments](#)
- [A Practical Guide to Managing UGA Postdoctoral Positions: Instructions and FAQs](#)
- [OPA webpage](#)
Postdoc Hiring Process: Overview

**Within UGAJobs**

1. **Position Request**
   - Hiring Unit Initiates
   - College/VP level (as required)
   - OPA ("Sponsored Office")
   - Central HR

   **Approved Position**

2. **Post Position**
   - Hiring Unit Initiates
   - College/VP level (as required)
   - OPA ("Sponsored Office")
   - Central HR

   **Posted Position**
   (Internal Posting/Direct Hire or Search)

3. **Hiring Proposal**
   - Hiring Unit Initiates
   - College/VP level (as required)
   - OPA ("Sponsored Office")
   - OGE (as applicable)
   - Central HR

   **Filled Position**

**Steps outside UGAJobs:**

1. If visa sponsorship is needed for candidate, contact OGE as early in the process as possible.

2. Draft offer letter and send to OPA for review. Exact timing will depend on search or direct hire.

3. Collect appointment documents required in HP. (See HP Cover Form.)
Postdoc Hiring Process: Detail of Step 1 - Position Request

Within UGAJobs

1. Position Request

Hiring Unit Initiates

- Create new or evaluate/modify existing vacant position.

College/VP level (as required)

- Follow internal routing as required by your college or school.
- Manually select Sponsored Office (OPA) to move to the next level.
- Make sure to send to one of the OPA staff members. The dropdown includes names that are not OPA staff members; these are for OPA use only.

OPA (“Sponsored Office”)

- OPA checks for: 100% FTE, duties and responsibilities with % time completed, correct BCAT used.
- OPA also checks for the college/VP level sign off, per the requirements that have been communicated to our office. If requirements for college level approval change, please communicate this to OPA. Position requests that skip necessary approval routing risk processing delay.

Central HR

 Creates new position.
2. Post Position

Hiring Unit Initiates
Include in the comments section if the posting is for a search or a direct hire so that OPA can determine the correct routing for the posting request.

College/VP level (as required)
- Follow internal routing as required by your college or school.
- Manually select Sponsored Office (OPA) to move to the next level.
- Make sure to send to one of the OPA staff members. The dropdown includes names that are not OPA staff members; these are for OPA use only.

OPA ("Sponsored Office")
- If internal posting/direct hire: OPA will submit directly for internal posting and send the internal posting link for the candidate back to the Initiator in the unit.
- If Search: OPA will review and submit to HR for posting on the UGA job board.

Central HR
Posts for a search.
Visa sponsorship is handled through the Office of Global Engagement – Immigration Services. Contact IS as early as possible when it is determined the candidate will need UGA visa sponsorship.

- Determine if the offer will be open-term or defined-term and then use the appropriate postdoc offer letter template. See the postdoc policy for details on open-term and defined-term offers.
- Email the draft to opa@uga.edu.
- If the offered salary is 10% above the corresponding level on the NIH NRSA Postdoc Stipend Levels scale for the candidate’s years of experience, then a salary justification must accompany the offer letter draft. (The NIH NRSA stipend levels are subject to change by fiscal year. Check that you are using the most current scale.)
- See page 4 of this document if the unit would like to extend an offer and process the HP for a candidate that has not yet completed all Ph.D. requirements: A Practical Guide to Managing UGA Postdoctoral Positions: Instructions and FAQs

- Postdoc HPs require appointment documents, which are the Postdoc Hiring Proposal Cover Form and the additional items in the checklist (listed at the bottom of the form).
- IMPORTANT: If the position is for a Postdoctoral Associate AC – BCAT 206X00 (Research and Teaching), which can teach a course(s) as Instructor of Record, then additional HP requirements and routing will apply. See the text instructions for full details.
- OPA prefers these documents are uploaded as one PDF file in the HP if the unit is able.
Postdoc Hiring Process: Detail of Step 5 – Hiring Proposal

**Within UGAJobs**

5. Hiring Proposal

- **Hiring Unit Initiates**
  - After completing Step 4 (Collecting required HP documents), Hiring unit creates Hiring Proposal for selected candidate and uploads the required HP documents.
  - OPA prefers documents are uploaded as one PDF file if the unit is able.

- **College/VP level (as required)**
  - Follow internal routing as required by your college or school.
  - Manually select Sponsored Office (OPA) to move to the next level.
  - Make sure to send to one of the OPA staff members. The dropdown includes names that are not OPA staff members; these are for OPA use only.

- **OPA (“Sponsored Office”)**
  - If there are no questions or issues, OPA will send the HP forward to Central HR.
  - If there are questions or items to correct, OPA will either email the unit or send the HP back for corrections.
  - In the case of a Postdoc Associate AC, 206X00 position, OPA will route the HP to the Office of Faculty Affairs for review.

- **Central HR**
  - Completes the hiring process.
  - Central HR will determine background investigation requirements.
  - Candidate should follow instructions from BI vendor that should come via email.