BPP Appointments
User Guide

Create a candidate
1. Click on Create Candidate
2. Enter the required data. You will need the candidate's name, email address, Mentor's name, department and the International status if international. For International Candidates, click yes for international (A). A menu will appear once you have clicked yes. Choose the Candidates international status whether it is J-1, H-1B or F-1 Opt, etc. If you select J-1, another menu appears and you <u>must select Research Scholar</u> (B). There is an option for an International Postdoc who has a Permanent Resident card. Please select US Immigrant/Permanent Resident (C). It is important to select the correct status because this determines which letter template to use when you generate the letter.
3. Once you have entered all of the information click, submit.

Results:
- Candidate will appear on your dashboard
- Candidate receives email to log into the Postdoc Portal and complete his/her information, upload required documents, and sign the Participation Agreement
- When the candidate completes all required information, the PD Info column will be checked on the Dashboard
- When the candidate signs the Participation Agreement, the document is able to be printed and the column will be checked on the Dashboard

Create an appointment
1. After you create the candidate, you will land on the new appointment where you can complete the information
2. Or, you can navigate to the appointment later by clicking on the Candidate's name > Appointment tab > Create new Appointment
3. Enter the required data and submit

Results:
- After you create the appointment, you can generate the appointment letter

Verify uploaded documents
1. When the candidate uploads documents, the Creator of the appointment will receive an email
2. Click on the link in the email to go to BPP Appointments
3. Click on the candidate on your dashboard, then go to the Upload Documents tab
4. Open each document to confirm it is the accurate document and then click the check box to verify

Results:
- Required documents will be checked on the Dashboard

Generate the Appointment Letter
1. On Appointments tab, click on the Generate Appointment Letter button
2. Complete form and make sure if International that the correct International status is at the top of the form (J-1 or other. Please see below for further information on the different International letters).
3. Save and View Letter, then when ready click Send Email to Mentor

Results:
- Mentor receives email to sign the appointment letter

Mentor signs the Appointment Letter
1. Mentor will click on the link in the email, then click on the Appointment letter button next to the candidates name on his/her dashboard
2. Mentor will electronically sign the appointment letter by clicking a checkbox on the letter

Results:
- Candidate receives an email to sign the letter

- Creator of the appointment receives an email that the mentor signed the letter

Candidate signs the Appointment Letter
1. Candidate will click on the link in the email, then click on the Appointment Letter tab to sign the appointment letter

Results:
- Creator of the appointment receives an email that the appointment letter was signed by the candidate
- The appointment letter is now in pdf form and is able to be printed by clicking on the appointment tab > Appointment Letter
- The Appointment Letter column is checked on the Dashboard

Print Documents
1. *Appointment Letter* – it is printable after both signatures are complete – print from the Appointment tab
2. *Participation Agreement* – printable after candidate signs – print from the Participation Agreement tab
3. *Uploaded Documents* – click on any uploaded document to print it
4. *Postdoc Information Form* – click on Documents > Postdoc Information Form - document contains all information needed to enter postdoc into PennWorks
5. *Foreign National Information Form* – click on Documents > Foreign National Information Form – document contains all information on the International tab – form can be sent to the tax office along with required documents
6. *The Packet* – you can print all generated forms at one time by clicking on the Packet tab –
   a. Packet contains:
      i. Postdoc Information Form
      ii. Appointment Letter
      iii. Participation Agreement
      iv. Foreign National Information Form
   b. Packet will not contain the appointment letter or the participation agreement until it is signed

Dashboard
1. Allows you to quickly access the candidate's record and track and monitor the progress of your candidate's appointment process
2. Candidate will appear on the dashboard when you create the candidate
3. Candidate will no longer appear on your dashboard
   a. After the start date of the appointment AND
   b. All columns have been checked AND
   c. The postdoc has visited the BPP Office

Search
1. After the postdoc has dropped off the dashboard, you may access the record by clicking on the Search tab
2. As a BA or Coordinator, you have access to any candidate in your department
3. As a Mentor, you have limited access to the candidate's to who you are the mentor
4. You will also use search to add a postdoc for reappointment. Please see reappointments for more information

Generating International Letters
1. Different language on the appointment letter when the candidate has a J-1 immigration status. On the Create Candidate page, at the beginning of the process, select Y for international and then select the correct International Status.
2. There are now three letters with different language depending on immigration status:
   - **US:** International candidate? = N
   - **International candidate with a J-1 status:** International candidate = Y AND International > Immigration status = J-1 > J-1 Category = Research Scholar (B)
   - **International candidate not J-1 status:** International candidate = Y AND status is NOT J-1 > Select the correct international status such as H1-B or F-1 etc. (A)

- **For an International Candidate who has a Permanent Resident card:** Select Y for International > select US Immigrant/Permanent Resident as the International Status (C)

Examples of selecting the International Status for International Candidates from Create a Candidate Section:

    A.   When you select Y for International Candidate an Immigration Status Menu appears:

* **International candidate?** ⦿ Yes ⚪ No

* **Immigration status**

⚪ F-1 Student
⚪ J-1 Exchange Visitor
⚪ US Immigrant/Permanent Resident
⚪ H-1 Temporary Employee
⚪ J-2 Spouse or Child of Exchange Visitor
⚪ Other

    B.   When selecting J-1 status a second menu will appear and you <u>must choose Research Scholar</u>:

* **International candidate?** ⦿ Yes ⚪ No

* **Immigration status**	* **J-1 category**
⚪ F-1 Student	⚪ Student
⦿ J-1 Exchange Visitor	⚪ Short-term Scholar
⚪ US Immigrant/Permanent Resident	⚪ Professor
⚪ H-1 Temporary Employee	⚪ Alien Physician
⚪ J-2 Spouse or Child of Exchange Visitor	⦿ Research Scholar
⚪ Other	⚪ Other

    C.   If the Candidate is International but they hold a Permanent Resident card Select US Immigrant/Permanent Resident:

* **International candidate?** ⦿ Yes ⚪ No

* **Immigration status**

⚪ F-1 Student
⚪ J-1 Exchange Visitor
⦿ US Immigrant/Permanent Resident
⚪ H-1 Temporary Employee
⚪ J-2 Spouse or Child of Exchange Visitor
⚪ Other

Reappointments

Steps to create a reappointment letter:

1. <u>Do not create a new candidate.</u> Click on Search on the left navigation bar. Please make sure that you search and add an existing Postdoc. There is now a warning on the Create a Candidate page with a link if you are reappointing.
2. Begin to type last name, first name, of the postdoc
3. When the name comes up, click on it
4. Click the Select button
5. When you search and select a postdoc on the top of the page you will see a notice saying: "This postdoc is not in the database. Click add postdoc to add the postdoc to the database." This means that the postdoc is not in the appointment system yet and you must add them in order to do their reappointment.
6. Review Mentor and Department and assure they are correct
7. If the Mentor or Department is blank or incorrect, search and select the correct one
8. Click Add Postdoc (you will land on the Postdoc Summary)
9. Click on the Appointment tab
10. Click the Create New Appointment button
11. Assure you select the correct Appointment Type for the Postdoc (i.e. if this is their 3rd appointment, select Reappointment (Year 3))
12. Complete the Appointment Form
13. Click Submit (you will land on the Appointments tab – when the appointment form is submitted, the postdoc will appear on the Reappointments Dashboard)
14. Click on Generate Appointment Letter to generate the letter
15. Click Save and View Letter
16. When you are satisfied with the letter, click Send email to Mentor
17. Alert the Mentor and Postdoc that an IDP is required and must be completed and uploaded in order for the Postdoc's Reappointment to be complete on the Dashboard. You can get a copy of the IDP template by clicking on the following link. IDP Template: https://www.med.upenn.edu/postdoc/postdoc-training-individualdevelopmentplan.html

Next steps:
- The Mentor will receive an email to sign the Letter
- When the mentor signs the letter, the postdoc will receive an email to sign the letter
- The BA/coordinator will receive emails when the mentor and the postdoc have signed the letter
- When the mentor and the postdoc have signed the letter, a checkmark will appear for Reappointment Letter on the Dashboard
- When the IDP is uploaded and verified, the postdoc will no longer appear on the Dashboard

Transfers:
- Transfers are not available on the system yet. We are trying to get minor updates completed first since transfers will be a larger project.
- How we are working around transfers is that the old department will upload a copy of the appointment letter and the resignation letter to the old department in the system.
- Once the postdoc's payroll record has been updated the new department should contact me so I can change the mentor's name and the department in the postdoc's record.
- If the postdoc transfers in the middle of their reappointment it does not become a new appointment. It is a continuation of the current year and they still will be reappointed on their reappointment date.
- By notifying me of the transfer and having me update their record this will allow the new department to reappoint them when their current appointment year ends.
- Once the transfer function is in production and available I will update everyone.

Archiving and Deleting:
- If you have a candidate who declines their offer, the PI rescinded the offer, or they take another offer elsewhere then we can archive their record. Only our office has the ability to archive records. In order to archive we will need to document the reason. If they have taken another offer elsewhere and you happen to know where please let us know as we would like to document that as well. Please call or email us to archive a record.
- If a record has been added by mistake, or there is a duplicate record then we will delete the record. We do not need to document a reason for deleting but as with archiving only our office has the ability to delete so please let us know.
- At this time we do not have the capability to delete reappointments. However, this is the next update to be completed. So if you have a reappointment that needs to be deleted please let me know as I am keeping track for when it is available. Also alerting me will keep me from asking a postdoc who isn't here anymore for an IDP.
- Deleting the initial appointment letter: Once the letter has been signed by both the mentor and candidate it will be in pdf form. In order to make a change in the letter now, such as if there is a delay in the candidate's arrival, you would have to delete the letter by clicking on the red trashcan. Once you have deleted the letter you can generate a new letter with the corrected dates or information.

Notes, Tips and Trouble Shooting:
- When verifying documents if you click on the document and you receive a forbidden message it is because there is punctuation marks in the name of the uploaded document that aren't supported. The only allowable punctuation marks in the document name are a dash, underscore and a period. (on a side note, we do have a note to fix this in the back log)
- If your candidate has been delayed please update their start date in their record. This way I won't be emailing you and the candidate looking for missing documents when they haven't even arrived yet.
- Once both parties have signed the letter, the letter will convert into a pdf. Once the letter becomes a pdf you can no longer make changes. If an update is needed you must delete the letter by clicking on the red trashcan and generate a new letter. If you have to generate a new letter the letter will have to be signed by both parties again.
- We do not want any documents that include the candidate or Postdoc's social security number uploaded into the system. I will remove any documents that are not required on the dashboard that contains a social security numbers.
- If your candidate is missing their check mark for the personal data or PD info (as it appears on the dashboard) please check the permanent address under the personal tab and career information under the appointment tab. The Permanent address is not starred but is required to get that check.
- If your candidate/postdoc no longer appears on the dashboard then they have completed all requirements. You can now use the search option on the left hand side of the dashboard.
- If print packet is not listed under documents then you need to zoom your screen out.
- Currently when you select US Immigrant/Permanent Resident it will still ask for the candidate's I-94, visa and passport. We understand that as a permanent resident they do not these documents and just need to provide their permanent resident card. We have a story either to fix this in the very near future if they haven't started it yet. For not the candidate can stay on the dashboard until this adjustment is made. I will correct any records when this is in production.
- If you have any problems or questions please do not hesitate to call or email me at 215-573-4578 or lacannon@pennmedicine.upenn.edu