



Brigham and Women's Hospital
Founding Member, Mass General Brigham



Policies and Guidelines for Postdoctoral Fellows

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**HARVARD MEDICAL SCHOOL
TEACHING HOSPITAL**

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I. Introduction

Brigham and Women’s Hospital (BWH) has developed these expectations, policies, and processes related to the appointment, roles, requirements, and responsibilities of Fellows and Faculty Advisors, with the intent of:

- Enhancing the postdoctoral training experience for Fellows and Faculty Advisors and addressing the unique and integral role of the Fellow in the hospital’s research mission.
- Providing guidance for those involved in hiring, managing, and mentoring Fellows by setting clear expectations and documenting the terms to which the Faculty Advisor and the Fellow agree, and providing terms for equitable and consistent treatment of all Fellows.
- Providing clarity of the terms of the employer/employee relationship – aside from the mentor/mentee relationship – and preventing misunderstandings of these terms.
- Complying with all applicable state and federal laws.

Fellows and Faculty Advisors are subject to all applicable BWH, Mass General Brigham (MGB), and Harvard Medical School (HMS) policies.

Note on Employment at Will: *The content of this document is presented as a matter of information and general guidance only. The document is not intended to constitute a contract between Brigham and Women’s Hospital (BWH) and a Fellow or Faculty Advisors. BWH reserves the right to change any of these policies at any time, without notice. All policies are regularly reviewed to ensure compliance with all applicable state and federal laws, regulations and BWH hospital standards.*

USING THIS DOCUMENT:

1. **Terminology:** We acknowledge that there are many terms, each having a particular connotation, which can be used to describe the primary parties to whom these policies apply. In most cases we will use the following terms for consistency and brevity:
 - **Fellow** – for a Postdoctoral Fellow, Research Fellow, Appointee, Advisee, or Mentee.
 - **Faculty Advisor** – for a Principal Investigator, Faculty Advisor, Faculty Mentor, or a Faculty member acting as a supervisor to the Fellow.
2. **Use of Asterisks:** * See **APPENDIX** section for appropriate instructions, forms or templates.
** See **POLICY** section for reference to related policies.

II. Policies and Guidelines

1. BWH Postdoctoral Fellow Definition

Appointments and Essential Characteristics

Postdoctoral appointments are preparatory training for a full-time academic and/or research career and involve substantial research or scholarship. The appointee is anticipated to receive or has already received a PhD, MD, MD/PHD, or equivalent doctorate. The appointee works under the supervision of a Faculty Mentor in the institution and is allowed to and encouraged to publish the results of their research or scholarship and receive credit for such during the appointment period. The appointee will receive training, professional development, and mentorship during the appointment period. The appointment is time-limited and should be for a term of no longer than five years.

Exceptions** will require the approval from BWH Research Leadership.

2. Harvard Medical School (HMS) Appointments

It is customary and recommended that a BWH Postdoctoral Fellow receive an [HMS appointment](#). The Faculty Advisor's departmental administrator will initiate and facilitate the HMS appointment process.

3. Postdoctoral Fellow Responsibilities and Obligations Policy

A. Required

All BWH Fellows agree to read and abide by the Medical Staff Bylaws, rules, regulations, and policies of the Professional Staff and of the [Hospital](#). Some of these policies govern entry to and exit from the institution. Key points among these policies include, but are not limited to:

- Abide by all tenets of the [MGB Research Code of Conduct](#) and the [BWH Code of Conduct](#).
- Conscientious discharge of assigned duties.
- Adherence to strict research integrity as defined by the [MGB Research Integrity Policies](#) and [HMS Integrity in Science Policies](#).
- Completion of required HealthStream modules, including an [Intellectual Property Acknowledgment \(IPA\)](#), upon arrival and annually or as required thereafter.
- Compliance with established laboratory practices, hospital, and regulatory standards.
- Observance of established regulations for research involving biohazards, human subjects or animals, and radiation.
- Demonstration of collegial conduct and professional workplace behavior toward all co-workers and laboratory staff.
- Fellows are expected to maintain (or develop) proficiency with the English language at a sufficient level to meaningfully engage in and understand all appropriate hospital and lab trainings and policies, perform day-to-day responsibilities within research projects, as well as culminating activities such as writing manuscripts, creating posters, presenting to live audiences, etc. See the [ORC Education](#) page for a free semesterly ESL Course geared towards BWH postdocs specifically.
- All materials, including lab notebooks (paper, digital or other) and data collected during a Fellow's training at BWH belong to the Institution, and not to the Fellow.
- Data and materials should not be removed from the lab or shared outside the lab in any form (including but not limited to grants, manuscripts, or conference presentations) without prior discussion and

consent from the Faculty Advisor.

- At the time of departure from BWH, each Fellow is responsible for the written notification to the Faculty Advisor and/or other departmental staff of the disposition of Research Records, including the location of all materials and data, medical records, consent forms and any other recorded information related to the research conducted at the hospital.
- Read through and comply with [MGB Research Data Management Requirements](#).
- Rigorously adhere to all MGB Data Security requirements, including when transporting data, accessing MGB systems, or otherwise conducting work outside of work premises (such as in a home environment).

B. Expected Career Development Responsibilities

The primary responsibility of a Fellow is to actively participate in the research enterprise of BWH under the supervision of a Faculty Advisor. While it is recognized that each individual Faculty Advisor has a unique style of conducting research, specific research expectations and training should be established in collaboration with the Faculty Advisor and should be outlined as early as possible.

Fellows have the additional responsibility of taking proactive ownership of their career development and research training during their tenure at the BWH. Through active participation in professional seminars, career training, use of career development resources, and meeting regularly with mentors and colleagues, Fellows gain a sense of responsibility for their career development and are better able to communicate their training needs. Additional expectations include, but are not limited to, participation in and completion of an **Annual Career Conference (ACC) Form (Appendix 3)**.

BWH Office for Research Careers (ORC) Career Development Resources:

The ORC provides a wide array of resources which address the career and professional development needs of both Fellows and Faculty at all levels. Fellows are encouraged to utilize the [ORC resources](#) as well as the [Learning Paths for Postdocs](#) on the [Brigham Research Education \(BRE\) website](#), which provide a guide to many trainings and courses across the institution and beyond.

Fellows may also benefit from additional professional and networking opportunities through the [BWH Postdoctoral Association](#) (BWH PDA).

4. Faculty Advisor Mentorship and Career Development Responsibilities and Obligations Policy

BWH recognizes that it is within the Faculty Advisor-Fellow relationship that most mentoring will take place and honors the latitude and discretion required to develop such relationships.

A. Faculty Responsibilities for Mentoring and Career Development

As per the [MGB Research Code of Conduct](#), Faculty Advisors are responsible for guiding and supervising the advanced training and scholarly pursuits of Fellows. Faculty Advisors should make clear the goals, objectives, and expectations of the research training and the responsibilities of Fellows working in their laboratory. Faculty Advisors are expected to meet regularly with the Fellows under their direction to communicate expectations and provide timely feedback of the Fellow's progress and performance. It is strongly recommended for Faculty Advisors to meet with each postdoc once a week. If this is not possible, Faculty Advisors should meet with each

postdoc as frequently as possible, no less than once a month, and be responsive to requests for additional meetings as needed.

Active mentorship of fellows and other personnel in a faculty member's lab is part of the Faculty Advisor's BWH appointment and employment and should be reviewed during the Faculty Advisor's own annual review with their Department Chair or Division Chief. Fellow's input may be solicited by the Department or Division leadership regarding mentor performance. Failure to meet mentorship requirements, including failure to conduct annual career conferences, may result in corrective action for the Faculty Advisor, up to and including termination.

Mentoring Resources:

- [Brigham Mentoring Toolkit](#)
- [Harvard Catalyst Educational Video Library](#): Past offerings on mentoring
- [Harvard Catalyst Course](#): Maximizing Mentee-Mentor Relationships – Empowering the Mentee
- [Harvard Catalyst Clinical and Translational Mentor Database](#) (Harvard Key or HMS eCommons ID required)

Additional responsibilities include:

- Detailing Fellow's responsibilities, expectations, and conditions of employment in the initial **Postdoctoral Fellow Offer Letter (Appendix 1)**
- Mentoring Fellows in fulfilling their responsibilities and obligations
- Fostering the professional development of Fellows toward achieving independence
- Providing career advice and job placement assistance to Fellows
- Assisting the Fellow in developing professional networks both internal and external to BWH
- Developing a concrete plan for the Fellow to achieve clear professional deliverables within span of postdoctoral training, including publications, posters, speaking engagements, independent funding and professional awards
- Providing opportunities for the Fellow's professional skill development and growth, including in areas such as mentoring and teaching, scientific writing and communication, grant writing, manuscript writing, peer review, lab management (financial, personnel, data management), IRB/IACUC/IBC protocol development
- Overseeing the Fellow's completion of various required and optional trainings, such as by reviewing and sharing the [Learning Paths for Postdocs](#) for offerings across BWH, MGB, and HMS/[Harvard Catalyst](#)
- Ensuring Fellows complete and understand all required trainings
- Adhere to all BWH, MGB, and HMS policies, including but not limited to:
- [MGB Research Code of Conduct](#)
- [HR-102 Policy Against Discrimination, Harassment, Sexual Harassment, Retaliation.](#)

B. Annual Career Conferences

It is required that the Faculty Advisor and the Fellow conduct Annual Career Reviews, using the **ACC Form (Appendix 3)**. The meeting is an opportunity for the Fellow to discuss recent accomplishments, current career goals and future plans for professional development with their Faculty Advisor and obtain feedback regarding progress and training. The outcome of the ACC should be a clear and mutually agreed upon plan for the upcoming year. The expectation is that the ACC be completed by the faculty advisor and documentation would be managed by the individual department or division. The following forms should be completed and documented by the Faculty Advisor:

- Reappointment and Salary Review Form (Appendix 4)
- If necessary, Appointment Extension Request Form (Appendix 5)

Timeline:

Year 1-4	ACC Required on annual basis
After 4.5 years	The Faculty Advisor should submit a letter with a plan of action to the Department Chair and complete the BWH Appointment Extension Request Form (Appendix 5) , if applicable.
After 5 years	A career consultation should be scheduled with another outside Faculty Advisor or a mentoring committee outside the lab, division, or department. Any Faculty Advisor or mentoring committee should be comprised of those not directly involved in the research endeavors of the Fellow. <u>If determined that extension is needed go to section 5.</u>

C. Reappointment and Salary Review Form*

The Faculty Advisor and the Fellow should complete the **Reappointment and Salary Review Form (Appendix 4)** at the time of the ACC. This form is intended to document the Fellow's salary for the upcoming year - or portion thereof. The Faculty Advisor should keep a signed copy in the Fellow's file, and the Fellow should receive a signed copy.

D. Career Development Resources

At the conclusion of the Postdoctoral training, the Faculty Advisor should assist the Fellow in preparing for the next job/career opportunity. At BWH, there are two professional staff employment tracks to consider:

1. Promotion to Faculty (Academic Track): The Researcher conducts research and receives funding as an independent investigator. The Investigator/Instructor plans, organizes and executes research projects to carry out their research vision. See the [HMS Faculty of Medicine Handbook](#) for additional information on criteria for promotion to Instructor.
2. Promotion to Research Scientist (Non-Academic Track): The Researcher may not receive independent resources; however, the Research Scientist conducts active, complex scientific research and makes strong intellectual contributions to the scientific strategies essential to the success of the project. (Certain salary minimums apply – check with Human Resources)

In addition, there are weekly paid/research staff positions that may be considered.

5. Extension to 5+ Years of Service – Policy and Process

The BWH Postdoctoral Fellow Definition states that the appointment should be for a term of no longer than five years. Under exceptional circumstances, a one-year extension to the 5-year term of service per BWH Postdoctoral Fellow appointment may be requested.

As outlined in the Faculty Advisor Mentorship and Career Development Responsibilities and Obligations Policy, after 4 years of service, if the Faculty Advisor and the Fellow agree that the best course of action is to request a one-year extension, then an **Appointment Extension Request Form (Appendix 5)** should be submitted by the

Faculty Advisor to the Department Chair and Departmental Administrator, and, if approved, then to the Research Leadership for approval. Appointment Extension Request Forms should be submitted at least 4 months in advance of the 5 years of service mark.

6. Salary Scale Policy

All Fellows must meet BWH salary requirements as outlined below:

A. Salary Scale and Implementation

It is expected that all Research Fellows will receive an annual salary of no less than the NIH/NRSA Salary Scale in effect at the time of appointment (current NRSA/Kirchstein scale can typically be found by googling “NRSA stipend levels” and current year. NRSA publishes new scales every year, generally around April). Salary must be adjusted on an annual basis in accordance with the progression of PGY level and the current NRSA salary scale. The [2022 salary scale](#) is provided here for reference only:

Years of Experience	Stipend for FY 2022	Monthly Stipend
0	\$54,840	\$4,570
1	\$55,224	\$4,602
2	\$55,632	\$4,636
3	\$57,852	\$4,821
4	\$59,784	\$4,982
5	\$61,992	\$5,166
6	\$64,296	\$5,358
7 or More	\$66,600	\$5,550

If a Fellow’s term of appointment is less than a year the annual salary should be pro-rated based on the number of months.

A Fellow’s salary may be paid directly from an external source and/or through standard BWH payroll. Salary requirements apply regardless of source of funding. All validated sources of salary support will be used to determine if the Fellow is paid at the NIH/NRSA Salary Scale. If the Fellow receives direct pay from external source(s), the [Documentation of External Support Form](#) must be completed. A Fellow who is paid entirely from external sources, not through BWH payroll, is not eligible for BWH benefits.

B. Annual Adjustments

When performance expectations are met, it is expected that compensation shall be adjusted each year at the end of the quarter in which the annual re-appointment takes place. Annual increases are expected to meet the NIH salary scale commensurate with experience and in concert with the BWH salary scale policy above. Annual Adjustments should be documented at the time of the **Annual Career Conference (Appendix 3)** using the **Reappointment and Salary Review Form (Appendix 4)**.

C. Part-Time Appointments

Ordinarily, Research Fellows are employed full time and receive full-time appointments to the BWH professional staff. Under certain circumstances, a Research Fellow may be employed part-time and should receive a part-time appointment from their department or division. Salary scale requirements also apply to part-time Fellows.

The annual salary should be pro-rated to reflect the part-time employment but cannot be less than the current Department of Labor salary threshold for exempt employees (as of Feb, 2022. Salary threshold is \$35,568).

Because the primary purpose of a Research Fellow appointment is to provide substantive training for the Fellow, not a service to the lab, per diem or non-exempt appointments less than the FLSA threshold are generally not allowed. Contact SVP of Research to discuss possible exceptions.

If a part-time appointment is made, documentation must be provided to ensure the part-time appointment is consistent with the rules of the funding source and visa requirements for Fellows who are not U.S. citizens or permanent residents. Any department or division intending to hire a new part-time Research Fellow or change a full-time Research Fellow's appointment to part-time must first consult Human Resources before acting. Fellows should be notified in writing in advance of any appointment changes.

D. Salary Minimums for Visa Holders

Different minimums may apply to individuals on J, H, or other visas. Please contact the [Office of Global Professionals and Scholars](#) (formerly PIPS) to determine minimums.

7. Time-Off Policy

BWH understands that Fellows should have opportunities to enjoy time away from work to help balance their lives. In addition, BWH recognizes that Fellows have diverse needs for time away from work, whether for personal time, vacation, sick time for themselves or their family members or other reasons. As Professional Staff, Fellows are expected to work with their Departments and Faculty Advisors to solicit approval for time off; requests must be balanced with professional and Departmental obligations. Fellows are encouraged to approach Faculty Advisors as early as possible to negotiate specific date requests for time off and/or any alternative arrangements to the above terms.

BWH expects that full-time Fellows will be able to take AT LEAST 15 business days off per year without any reduction or change in compensation. In addition, full-time Fellows will be able take time off to observe the holidays listed below.* Fellows should work with their Faculty Advisor to establish general expectations about how time off is managed and tracked. Time off can be taken as agreed upon in advance, by the Faculty Advisory and the Fellow. BWH recognizes that additional time off may be needed and is permitted if agreed to by the Department and Faculty Advisor.

Time off for Fellows is not an earned or accrued benefit; it is taken as needed with the approval of the Department and the Faculty Advisor. As such, time off cannot be rolled over and has no cash value.

Most research requires a flexible schedule to accommodate the fluctuating requirements of ongoing research projects. As such, it is recognized that most Fellows do not always work during standard business hours. Faculty Advisors are expected to work with their Fellows to provide flexibility of scheduling wherever possible, given the needs of an experiment. This includes recognition that, if a Fellow flexes to work during the weekend or late in the evening, that Fellow might similarly have flexibility to attend to their personal needs at other times during the week – without that time being considered “time off” under this policy. It is the responsibility of the Faculty Advisor to communicate with Fellows and arrange reasonable expectations regarding such flexibility. Fellows must obtain approval from their PI/Faculty Advisor prior to exercising a flexible schedule.

*Brigham and Women’s Hospital observes the following holidays, although fellows may choose to observe others if they choose:

Holiday	Date
New Year’s Day	January 1
MLK, Jr. Day	Third Monday in January
President’s Day	Third Monday in February
Memorial Day	Last Monday in May
Juneteenth	June 19
Independence Day	July 4
Labor Day	First Monday in September
Indigenous Peoples Day	Second Monday in October
Thanksgiving Day	Fourth Thursday in November
Christmas Day	December 25

8. Leaves of Absence

Any requests for a leave of absence, including Parental Leaves, should be discussed between the Fellow and Faculty Advisor. For more information about leaves that require time away from work for more than five (5) workdays, please refer to the following policies which can be found on Ellucid:

- [HR-400 – Mass General Brigham Leaves of Absence Policy](#), federal, and Massachusetts leaves.
- [HR-403 – Brigham and Women’s Hospital Personal Leave of Absence Policy](#)

9. Remote Work

In keeping with the policy of Mass General Brigham to establish a long-term and sustainable, flexible workplace program that allows both in-office and off-site work for appropriate roles within a structured framework, we encourage PIs to allow Fellows to work remotely when specific types of work allow it (for example, manuscript or grant writing, data analysis, reading, etc.). Any arrangements for remote work must be agreed upon in advance by the Faculty Advisor and Fellow.

Generally, it is expected that Fellows will still regularly be onsite to perform any tasks that require an onsite presence, to attend lab meetings or other collaborative meetings, and to meet with their Faculty Advisor. It is the Faculty Advisor’s responsibility to ensure that the Fellow is actively engaged and receiving appropriate training and mentorship throughout their postdoctoral fellowship.

It is generally not permitted for a Research Fellow to be fully remote. PIs may ask the SVP of Research for an exception to this policy and, at the time of the request, must provide a robust description of how the fully remote Fellow will receive the active supervision, training, and mentorship associated with a Fellowship. In no circumstance may a Research Fellow work fully remotely from a location outside of the United States.

10. Conflict Resolution

- Fellows are strongly encouraged to make all reasonable attempts to resolve any conflict or grievance through open discussions with their Faculty Advisor. While informal problem solving often proves to be the only necessary action, issues can arise that may require outside expertise or counseling to resolve. Fellows in need of assistance with an issue may contact any of the following resources for assistance:
 - **BWH Office for Research Careers (ORC):** BWHORC@partners.org
 - **BWH Postdoctoral Association Advocacy Committee:** BWHPDA@partners.org
 - **BWH Office of Mediation, Coaching, Ombuds and Support Services (OMCOSS)** provides voluntary and confidential support in numerous situations. See the [OMCOSS website](#) for more details.
 - **MGB Employee Assistance Program:** See the [EAP website](#) for more details.
 - The [Ombuds Office at Harvard Medical School](#) is a resource available to BWH Fellows which offers itself as an independent and safe forum to voice concerns about work related issues and to discuss career management. Please visit the website for more information or to schedule an appointment: hms.harvard.edu/ombuds
- For problems that are potentially related to research misconduct, please refer to the [MGB Research Integrity](#) policy and resources. Issues that may relate to research misconduct should be brought directly to the [BWH Research Integrity Officer](#).
- If you are experiencing a problem related to discrimination, harassment, sexual harassment, or retaliation that does not fall under the definition of research misconduct above, please refer to [HR-102](#). There are a number of options available to discuss or file a complaint, some of which are confidential. Please refer to both [HR-102](#) and the [Know the Line FAQ](#) for a comprehensive list.
- Refer to [AskMyHRPortal.com](https://www.askmyhrportal.com) for policies and other HR resources.

11. Termination Policy

Although Fellow appointments are time limited and should be for a term of no longer than five years, Fellows are “At Will” employees of BWH and their employment may therefore end at any time for any reason not in violation of Federal and State Laws and hospital policy. Fellows may also terminate their employment at any time. *In all cases, before the decision is made to terminate a Fellow, the Faculty Advisor and/or Department Administrator must contact the BWH HR Consultant supporting professional research staff for guidance on the process.*

As per the [HR-117: Introductory Period](#) policy, all employees are subject to a 90 day introductory period intended to provide the employee with an opportunity to demonstrate his or her ability to achieve a satisfactory level of performance, and to determine whether the new position meets the employee’s expectations. BWH uses this period to evaluate the employee’s capabilities, work habits, and overall performance. Where appropriate, weakness in performance, behavior or development should be brought to the employee’s attention for correction. Employees may be terminated without warning, notice, or pay in lieu of notice at any time during this period. Managers must work with HR prior to exercising this option.

In all cases, at the time of departure from BWH, each Fellow is responsible for a written notification to the Faculty Advisor and/or other departmental staff of the disposition of Research Records, including the location of all materials and data, medical records, consent forms and any other recorded information related to the research conducted at the hospital. The appropriate forms for this notification may be obtained on the [Research Navigator](#) (must login with your BWH credentials).

Fellows who are leaving one position and seeking another lab at BWH may benefit from use of the MGB [ElasticWork](#) internal job search tool.

A. Notice of Termination

Below are some examples of termination reasons and notice periods. **NOTE:** This is not an all-inclusive list.

- Organizational Change due to but not limited to, lack of funding, lab closing, or lab relocation. It may be the case that financial support for a Fellow may be reduced or terminated by an action of an extramural granting agency beyond the Faculty Advisor's control. In the event that funding cannot be secured to continue the appointment, a minimum of three months written notice generally should be provided so that the Fellow has sufficient time to arrange for departure from BWH and/or transition to other opportunities within BWH.
 - In the event of a lab closing/relocating, while three months written notice is generally provided, no less than 45 days written notice is permitted. In certain circumstances the length of the notice period may be legally mandated. Lab members who are offered and accept a position in a relocated lab will be considered to have voluntarily resigned from BWH upon the lab's closure.
 - Under certain circumstances, the department and the Office for Research Careers may be able to assist the Fellow in finding another opportunity at BWH. Fellows can also visit elasticwork.mgh.harvard.edu for a listing of open positions across the MGB system.

- Expiration of term of service. As a Fellow approaches the five year maximum term of appointment, the annual **Reappointment and Salary Review (Appendix 4)** form should indicate the non-renewal status of the Fellow appointment. In addition, the Faculty Advisor should provide three months written notification prior to the expiration of the term of employment. *(See APPENDIX - Instructions, Templates and Forms)
 - Any request for extension of the maximum term of appointment* for a Fellow should be received by the Chief Academic Officer and Senior Vice President, Research no later than four months prior to the expiration of the maximum term of appointment.

- Due to poor performance. It is the responsibility of the Fellow to achieve and sustain job performance and productivity expectations as outlined by the Faculty Advisor. The Faculty Advisor may identify training or other resources to improve performance and address discrepancies. In the event of significant performance concerns such that termination is being considered, the Faculty Advisor always consults with HR regarding appropriate actions. Except in limited situations including termination during the Introductory Period, a minimum of three months written notice should be provided to the Fellow to arrange for departure from BWH. This written notice period may be in the form of a documented Performance Improvement Plan.

- Due to violation of hospital or Partners policies, procedures, and standards, and conduct that is detrimental or disruptive to hospital operations. The HR and Research Integrity policies are available at:
 - [The BWH Human Resources Policy and Procedures Manual](#)
 - [MGB Research Integrity Policy](#)
 - **NOTE:** Depending on the nature, severity, or pattern of the violation or misconduct there may be circumstances where termination will occur immediately or where notice of less than three months is warranted.

- Resignation by Research Fellow. A Fellow seeking to resign from their position prior to the expiration of the current appointment should observe the professional standard of offering at least thirty (30)-days' notice in writing to their Faculty Advisor.

B. Visa Considerations

During the termination notice period, Foreign National Fellows should work with the Department Administrator and contact [Office of Global Professionals and Scholars](#) (formerly PIPS) for important information regarding the impact of the termination on their visa status, duration of their stay in the United States after termination, potential visa transfer if they find another employment position and other related issues.

C. Benefits at Termination

Fellows will receive information from HR describing what happens to benefits upon termination. Detailed information regarding temporarily continuing health benefits will be sent to the Fellow's home address after the termination date. No payment will be made for vacation or holiday time off that was not used.

D. Termination of Staff Appointment

A Research Fellow's appointment to the BWH Professional Staff may be terminated, and such termination reviewed, consistent with the terms and processes set forth under specific [policies in existence for ACGME and non-ACGME Fellows](#), if applicable.

III. Appendices

1. Faculty Advisor Guide to Postdoctoral Fellow Onboarding

A. Identifying the Right Candidate

Sourcing Tools

There are a number of options to both advertise and source for candidates. Leveraging technology, including social media, targeted job boards and publication home sites is proving to be an efficient and speedy way to attract talent.

- Social Media: Advertising your current position on your Twitter and LinkedIn pages
 - Consider setting a unique page for your Lab
 - Ensure adherence to the [Social Media, Electronic Communication and Acceptable Use Policy](#)
- Targeted Job Boards: There are many options but consider some of these locations:
 - <https://www.postdocjobs.com/employers>
 - <https://www.minoritypostdoc.org/recruiting>
 - <https://www.indeed.com>
 - BWH Career Page (contact your Recruiter for assistance)
 - [MGB ElasticWork](#) (internal job openings for postdocs already in the MGB system)
- Journal Sites: Many journals offer online posting tools. Some may be free, but others can come at a cost. There are many options but consider some of these:
 - <https://employers.sciencecareers.org>
 - <https://www.nejmcareercenter.org>
 - [Journal Listings](#)

Interview Resources

You should always interview candidates in person (meeting by Zoom is considered in person) and should never rely solely on a CV or letter when making staffing decisions for any type of role in your group. Live interviews will enable you to more fully evaluate a candidate's fit for your group, including technical, interpersonal and communication skills.

MGB offers a number of trainings to support staff in the interview process. These training courses aim to provide interviewers with the tools to develop objective/behavioral interview questions, as well as eliminate biases. Please consider these resources:

- [Behavioral Based Interviewing Training](#)
- [Unconscious Bias: What to do about it in the search and recruitment process](#)
- [ABC's of Interviewing: Stay Legal](#)

Completing References

In addition to the live interview, robust reference checks from multiple sources are a critical tool for ensuring a candidate will be a good fit for your group. There are several options for completing references prior to the offer stage. Please review the link below for tips and guidance on conducting your own reference checks. MGB also offers a reference checking tool call Skill Survey that is also highlighted in the link below. Please consider these options.

- [Conducting Effective Reference Checks](#)
- Skill Survey (contract your Recruiter for assistance)

When to Work with Human Resources

Human Resources can serve as a partner throughout this process. Please do reach out to them for support as follows:

- Recruiter: assistance/guidance on posting language, interviewing questions
- BWPO: assistance/guidance on benefits, onboarding, timelines
- The [Hiring Policy](#) also provides guidance on the entire hiring process

B. Making an Offer to a Potential Fellow

The "BWH Fellow" offer letter template was developed by Human Resources (HR) in collaboration with the Office of General Counsel. **It is required that all offers be made using the standard offer letter template.** The offer letter is intended to document the terms of hiring and employment at BWH for new postdocs. It is an integral part of a set of policies which address all issues related to employment at BWH. Please note that the offer letter template must also be used when converting non-employees (POI) to paid employee status.

The BWH Fellow offer letter template is located on the [BWH Monthly New Hire Onboarding site](#), in the "Offer Letter Templates" section shown below.

- Please note, HR requires at least **45 days** to complete the onboarding process.
 - Before extending an offer, be sure to utilize the submission deadline calendar to ensure compliance with HR deadlines and that the start date aligns with the BWH New Employee Orientation schedule.
 - Start dates must always be on a Monday (or Tuesday if Monday is a [BWH observed holiday](#)).
- We highly recommend that you bookmark the [BWH Monthly New Hire Onboarding site](#) and visit it each time before an offer is made to ensure you are using the most up-to-date version of the offer letter template.
 - The "Announcement" section at the top of the site will always indicate when the offer letter template was last updated.
 - Offer letters submitted to HR with outdated or incorrect language will be returned to the department for amendment.

In addition to offer letter templates, new hire form templates and additional resources for BWH monthly paid hiring are included on the [BWH Monthly New Hire Onboarding site](#). If you have questions regarding the BWH Fellow offer letter template or the monthly-paid onboarding process, please contact bwhhrprostaff@partners.org.

Offer Letter Templates

Departments are required to use the most recent templates. You can add language to offer letters as necessary, but you must keep all of the required paragraphs. It is particularly important to use the most recent "Conditions of Employment" language, which documents agreement to criminal/education background checks, drug screening, Occupational Health clearance, and various compliance items.

- [BWH Fellow](#)
- [BWH Monthly Researcher \(Scientists and Faculty\)](#)
- **Before you make an offer, be sure to utilize our submission deadline calendar to ensure compliance with HR deadlines!**

C. Onboarding a Fellow Through the Office of Sponsored Staff and Volunteer Services (OSSVS)

If you are hiring a Fellow whose salary is directly paid from an external source such as a Fellowship, please work with the [Office of Sponsored Staff and Volunteer Services](#) to onboard them as a Sponsored Employee. You should still follow the same process as outlined above in terms of identifying candidates and making an offer, but should work with OSSVS rather than HR to onboard. The requirements outlined in this Postdoc Policy do apply to Fellows who are Sponsored Employees.

If you are onboarding someone who is already employed as an employee at another institution but is coming to BWH to be trained (while remaining an employee at another institution), that person is considered a Collaborator. They should be onboarded through the [Office of Sponsored Staff and Volunteer Services](#). Since they are an employee of another institution, not BWH, this Postdoc Policy does *not* apply to them.

D. Getting a Fellow Started: Training and Resources

Welcoming Postdocs to the Brigham – Expectations

There is a lot to learn and navigate as a new Postdoctoral Fellow at the Brigham. Faculty/PIs should keep this in mind throughout the onboarding process and work to foster a welcoming environment, introducing postdocs to members of the research group and facilitating other key connections beyond the immediate team.

The institutional training resources described below are great starting points for learning the skills required to conduct research within the Brigham/MGB community. It is expected, however, that faculty/PIs take this training a step further: Fellows will need to discuss what they have learned in the institutional courses with their faculty/PI to understand how the content fits within the context of their unique research environment.

Additionally, it is expected that faculty/PIs provide the necessary lab- or study group-specific training that is not provided at the institutional level. For example, faculty/PIs should ensure postdocs are promptly provided with:

- A tour of the research space
- Safety/emergency plans and protocols
- Lab-specific SOPs
- IRB/IACUC/IBC protocols and any subsequent training detailed on each protocol

Faculty/PIs are also responsible for following any required training at the department/division level.

Initial training, both at the local and institutional levels, should be completed promptly following the postdoc's arrival at the Brigham (i.e., over the first few weeks/months) and revisited as necessary each year.

Institutional Training and Resources

- [Brigham Research Education](#) (BRE)
 - [Learning Path for Postdocs/Fellows](#)
 - The learning path outlines required and elective trainings for postdocs along three tracks (human subjects research, animal research, and bench research). Faculty/PIs should review the document with each postdoc to determine which trainings apply. The offerings are geared toward the entire Brigham research community (or an even wider audience in some cases), so it is imperative that postdocs discuss with their PI/colleagues how concepts from these trainings apply to their unique research environment.
 - For postdocs working on a cancer study, please review the [Dana-Farber/Harvard Cancer](#)

Research Fellows are required to complete NEO on their date of hire and can expect NEO to cover:

- System set up which includes activating their BWH user ID, password, email address and entering payroll information
- Information specific to visa holders, such as the Social Security Number (SSN) application process and Foreign National Tax information
- Overview of benefits available to paid employees such as health insurances like medical, dental, and vision
- Resources available to researchers at BWH

Part of the onboarding process includes completing the I-9 Employment Eligibility Verification process with HR, which is used for verifying the identity and employment authorization of individuals hired for employment in the United States. Research Fellows will be asked to present [I-9 acceptable documents](#) to HR in-person within 3 days of their date of hire. For J-1 visa holders, the [USCIS Exchange Visitor site](#) states what documents they should plan to provide. Research Fellows will receive an email directly from HR at bwhhrprostaff@partners.org to coordinate completion of the I-9 process.

Research Fellows should contact their department's visa coordinator with any questions related to the visa application process. The name of their department's visa coordinator should be included in their offer letter. If the Research Fellow is unsure of who their department's visa coordinator is, they can email HR at bwhhrprostaff@partners.org.

The Office for Global Professionals and Scholars (GPS), formerly known as PIPS, provides immigration services for Mass General Brigham Institutions. [The GPS website](#) contains helpful information for foreign nationals traveling to the United States to work at BWH.

Research Fellows that have a J-1 visa that is sponsored by Mass General Brigham (indicated on box 2 of their DS-2019) will be required to complete an [International Orientation](#) through the GPS Office, which includes information about travel, visa requirements including [health insurance requirements](#), and adjusting to life in the United States. Research Fellows can expect to receive communication directly from the GPS team on how to schedule their International Orientation.

Please note that International Orientation is an additional orientation, separate from the New Employee Orientation completed on their date of hire.

B. Getting Started: Training and Resources

There is a lot to learn and navigate as a new Postdoctoral Fellow at the Brigham. The Faculty Advisor will work with the Fellow to foster a welcoming environment, introduce the Fellow to other members of the research group, and facilitate other key connections beyond the immediate team.

Some of the specific training that will be provided by the Faculty Advisor or designated other member of the lab include:

- A tour of the research space
- Safety/emergency plans and protocols
- Lab-specific SOPs

- IRB/IACUC/IBC protocols and any subsequent training detailed on each protocol
- Any department/division specific required trainings
- One-on-one meeting with the Faculty Advisor to discuss and plan for other relevant institutional trainings, such as those listed in the [Learning Paths for Postdocs/Fellows](#) and other resources.

If these resources and trainings are not provided, the Fellow should feel empowered to request them. It is the responsibility of the Faculty Advisor to ensure the Fellow receives any training and information required to perform their duties.

Initial trainings should be completed promptly following the Fellow's arrival (i.e., over the first few weeks/months) and revisited as necessary each year.

Training, both formal and informal, is an integral and ongoing part of the Fellow's role. In addition to identifying relevant institutional trainings, the Faculty Advisor should be available to discuss how the content of those trainings relate to the context of the Fellow's unique research environment.

3. Annual Career Conference Instructions

The ACC Form provides a structured format and an opportunity for the Fellow to discuss recent accomplishments, current career goals and future plans for professional development with their Faculty Advisor and obtain feedback regarding progress and training. The outcome of the ACC should be a clear and mutually agreed upon plan for the upcoming year.

A. Instructions for Faculty Advisors

1. **SCHEDULE ACC MEETING WITH FELLOW:** Every year, in advance of the fellow's date of hire anniversary, the Faculty Mentor/PI must notify the Fellow that it is time for Annual Conference and schedule a meeting to conduct the ACC. This notice should occur preferably a month in advance, so the Fellow has adequate time to prepare the ACC Form.
2. **PREPARATION AND PRE-REVIEW OF THE ACC FORM:** The Fellow is expected to complete the ACC Form and submit to the Faculty Mentor for review prior to the ACC meeting. It is estimated that preparing this form should take the Fellow less than an hour to prepare. *Not all areas may apply to all Fellows, and some may be more applicable to senior postdocs than to new or junior postdocs.*
 - The Fellow will save the document as "*Postdocname_ACC_Date.doc*" and send it to you via email along with the required attachments before the meeting.
 - Complete the sections indicated for your feedback and comments in Parts 2, 3 & 4, in response to the Fellow's comments.
 - **ATTACHMENTS:** If the Fellow is required to prepare an annual progress report in support of funding and/or Fellowship awards (e.g., NRSA), they will attach a copy of the updated version to this form and only fill out those sections not addressed otherwise. Other required attachments are the CV (in HMS format if available) and an NIH bio-sketch.
 - Email the completed form back to the Fellow or print two copies to bring to the meeting.

3. **DURING MEETING:** You and the Fellow should review the completed ACC Form during the meeting. This form is intended to guide the conversation, and to document goals and progress. You and the Fellow should sign this form at the end of the meeting.
4. **POST-MEETING:** For your records and for your research and career guidance, you should obtain a copy of the form which has been signed by both you and the Fellow. The ACC is intended to be a working document which the Fellow maintains and updates as progress is made and goals are attained, in addition to being a guide for the Fellow as they move forward.

B. Instructions for Postdoctoral Fellows

1. **IN ADVANCE OF ACC MEETING:** When your Faculty Advisor notifies you to schedule your ACC, you will need to complete the ACC Form. It is estimated that preparing this form will take less than an hour and should be completed to the best of your ability prior to your scheduled meeting. *Not all areas may apply to all Fellows, and some may be more applicable to senior Postdocs than to new or junior Postdocs.*
 - Complete Parts 1-4 of the ACC Form. Include goals as identified in prior year's ACC if applicable. Leave blank spaces where indicated for feedback and comments from your Faculty Advisor in Parts 2, 3, & 4. *The form can be expanded or collapsed to allow for as many pages as appropriate for your needs.*
 - Save the document as "Your name_ACC_Date.doc"
 - ATTACHMENTS - If you are required to prepare an annual progress report in support of funding and/or fellowship awards (e.g., NRSA), please attach a copy of the updated version to this form and only fill out those sections not addressed otherwise. Other required attachments are your CV (in HMS format if available) and your NIH bio- sketch.
 - Email the completed ACC Form and all attachments to your pre-identified Faculty Advisor before the meeting.
 - If Faculty Advisor emails the completed form back to you, bring 2 copies to meeting.
2. **DURING MEETING:** You and your Faculty Advisor should review the completed ACC Form during the meeting. This form is intended to guide the conversation, and to document goals and progress. You and your Faculty Advisor should sign this form at the end of the meeting.
3. **POST-MEETING:** For your records and for your research and career planning, you should obtain a copy of the form which has been signed by both you and your Faculty Advisor.

4. Annual Career Conference Form

ACC FORM | PART 1 | GENERAL INFORMATION

NAME/DEGREE:		DATE:
EMAIL:	EMPLOYEE ID:	
DEPARTMENT:		
PGY LEVEL (LEVEL DURING REVIEW YEAR. IT IS EXPECTED FELLOW WILL ADVANCE TO NEXT PGY LEVEL AT CONCLUSION OF ACC REVIEW)		
0 1 2 3 4 5 5+		
FACULTY ADVISOR/MENTOR:		

ATTACHMENTS:

- FELLOWSHIP/FUNDING PROGRESS REPORT (IF APPLICABLE)**
- CURRICULUM VITAE (IN HMS FORMAT)**
- NIH BIOSKETCH**
- SALARY AND REAPPOINTMENT FORM**
- BWH APPOINTMENT EXTENSION FORM (IF APPLICABLE)**

ACC FORM | PART 2 | RESEARCH CAREER PROGRESS IN THE PAST YEAR

1. Goals from previous year, and progress toward meeting these goals (cut and paste from previous ACC form if applicable):
2. Are there any reasons why you did not meet these goals?
3. Research ACC Accomplishments – examples of significant scientific progress, data, breakthroughs, or obstacles you have overcome:
4. Research activities – <i>Highlight major new additions to your CV here</i> (publications, presentations, patents issued or filed, funding, fellowships, committee membership, and awards):
5. Professional activities – teaching, mentorship activities, supervisory responsibilities, and other (e.g., lab citizenship, teamwork & collaborations):
<i>FACULTY MENTOR'S COMMENTS/ADVICE ON RESEARCH FELLOW'S PROGRESS (Discuss time off requests for the upcoming year):</i>

ACC FORM | PART 3 | RESEARCH CAREER GOALS FOR THE UPCOMING YEAR

1. Research activities - anticipated publications (with proposed titles and expectations of authorship) and their current status (in progress, submitted, under review, etc.), any patent applications pending, anticipated attendance at national or professional meetings, plans to apply for funding or fellowships, committee memberships, awards, etc.:

2. Research goals – examples of significant scientific obstacles to be overcome or area of focus:

3. Professional activities – teaching, mentorship activities, supervisory responsibilities, and others (e.g., lab citizenship, teamwork & collaborations):

FACULTY MENTOR'S COMMENTS/ADVICE ON RESEARCH FELLOW'S GOALS:

ACC FORM | PART 4 | CAREER GOALS & PROFESSIONAL DEVELOPMENT

<p>1. Long-term career goals and objectives (e.g., academic research career, industry research, government, etc.)</p>
<p>2. Areas of further training or skill development to enhance ability to achieve these goals [academic development (e.g. reviewing manuscripts/grants), other: (e.g. presentation, management, or leadership skills)]:</p>
<p><i>FACULTY MENTOR'S COMMENTS/ADVICE ON RESEARCH FELLOW'S CAREER GOALS AND PROFESSIONAL DEVELOPMENT:</i></p>

WAS TIME OFF DISCUSSED FOR THE UPCOMING YEAR? YES NO

FELLOW SIGNATURE: _____ DATE: _____

FACULTY ADVISOR SIGNATURE: _____ DATE: _____

5. Reappointment and Salary Review Form

This form is intended to document the Postdoctoral Fellow’s salary for the upcoming year. The Faculty Advisor should keep a signed copy in the Fellow’s file, and the Fellow should receive a signed copy.

NAME/DEGREE:		DATE:
EMAIL:	EMPLOYEE ID:	
DEPARTMENT:		
UPCOMING YEAR PGY Level:	0	1 2 3 4 5 5+
INITIAL HIRE DATE:	CURRENT APPT. ENDS:	
FACULTY ADVISOR:		
CURRENT SALARY:	SALARY SOURCE: NIH _____ OTHER _____	
SALARY SOURCE (GRANT NAME, #):		

STATUS:

- Renewal of Postdoctoral Fellow Appointment
- Is a 5th year extension requested? If yes, please specify reason: _____
- Change of Status:
 - Transition to Research Scientist / Senior Research Scientist position*
 - Appointment to Instructor*

COMMENTS:

SALARY FOR UPCOMING YEAR: _____ SALARY SOURCE: NIH_OTHER _____

SALARY SOURCE(S) (GRANT NAME, #): _____

RESEARCH FELLOW SIGNATURE: _____ DATE: _____

FACULTY ADVISOR SIGNATURE: _____ DATE: _____

6. Appointment Extension Request Form

Instructions: Complete the top of this form, obtain signatures and documentation required in Parts 1 & 2, and submit to [Allison Moriarty](#) 4 months in advance of 5-year service mark. In the event of parenthood, please submit the form at the time of the qualifying event. Please keep completed signed copy of the extension request when/if approved.

Questions? Email BWHORC@partners.org

Name:		Employee ID:
Date of Hire:	Current Appt. Ends:	
Department:		
HR Department Representative:		
Please check all that apply:		
<input type="checkbox"/> Parenthood (<i>automatic approval – explanation not required</i>)		
<input type="checkbox"/> Nature of research requires additional time		
<input type="checkbox"/> Appointee took extended and approved leave of absence		
<input type="checkbox"/> Undertaking additional training in different field/specialty or area of expertise		
<input type="checkbox"/> Other (<i>please indicate: _____</i>)		
Please explain the rationale and circumstances for this request. A letter of explanation may be attached:		
Requested Extension End Date (not to exceed one year):		
REQUESTING SPONSOR (Principal Investigator)		
Print Name: _____		
Signature:		Date:
RECOMMENDED BY (Department Chair)		
Print Name: _____		
Signature:		Date:
<i>SUBMIT FOR APPROVAL ONLY WHEN THE ABOVE SIGNATURES HAVE BEEN ACQUIRED</i>		
APPROVAL BY SENIOR VICE PRESIDENT, RESEARCH OPERATIONS		
Signature:		Date: