
PeopleSoft Project

Postdoc Web Forms

What to Expect and How to Prepare

Why Do This? Issues

1. Insecure handling of protected private information.
2. Inefficiencies
 - Incomplete paperwork
 - Incorrect paperwork
3. Workflow
 - Status of transactions
 - Notification to administrators, postdocs and faculty
4. Reporting
 1. Giving you the tools to track and report on all postdocs in your department

Project Scope, includes

1. **Web Forms** and interfaces to support all Postdoc administrative processes and system notifications
2. **Document upload**, storage, and management features to support submission and management of required documentation in electronic format
3. Integration with **SEVIS/Bechtel** for visa administration
4. **Tracking** of current processes and of upcoming end dates of appointments, provisional appointments and other appointment holds
5. Reporting of **International Activity** for postdocs (i.e., Form 990 data)
6. **Migration of historical data** from OPA's Filemaker database
7. **Queries** to support meaningful searches on Postdoc data within the PeopleSoft system

What Does It Mean For Common Tasks?

1. New Appointments

- Administrator starts the appointment process online.
- Postdoc enters his/her data. Uploads diploma, CV, external funding letters...
- Administrator enters department/appointment data. Uploads any other necessary documents.
- Faculty Mentor/PI approves online
- Chair/Proxy/DFA reviews and approves
- Offer Letter generated online. Accepted online by postdoc
- Packet received and reviewed online by OPA
- GME notified for Clinical Fellows

2. Appointment Changes, Terminations and Leaves of Absence: to be submitted online.

3. At any time, administrator can query PS for his/her postdocs

Workflow Roles

- **Administrator (required):** entry of appointment information.
- **Coordinator (optional):** review of Administrator submissions for compliance with university policy.
- **Chair/DFAs/Proxy (required):** signs-off on Department commitment to appoint a postdoc. Faculty member has the funding, has the project; term of appointment, special arrangements; salary appropriateness. Other issues.

Training Requirements (updated 11/15)

- **For Administrators - all of the following:**
 - 1. PeopleSoft Concepts and Compliance (online)**
 - 2. PeopleSoft Postdoctoral Administration:**
 - **In-class attendance required in December and early January**
 - **UPK and Online Training Modules in Place in January 2011**

Project Team

- **Project Expert Partner Group:**

Bernadette Romo (Anesthesia), Patty Wunningham (Pathology), Angela Estrada (Neurology&Neurosurgery), Christina Kasson (Med/Oncology), Vanessa Bravo (Dev Bio), Ronda Fenton (FSI), Tara Ilich (Earth Sciences)

- **Project Manager: Tricia Richter, AS**

- **Project Lead: Shannon Monahan, OPA**