# Postdoctoral Administrators Quarterly Meeting

Nov. 13, 2012
10:00 a.m. – 11:30 a.m.
LKSC 120

Agenda

- Winter Closure Deadlines for OPA and Bechtel –Al
- "Unlisted University" on Information Sheets - Al
- Back-up Approvers for Workflow - Al
- Recommendation Form in PD Web Forms: Uploading Documents - Tammy
- NSF & NIH Survey – Shannon
- Tuition Reminder – Shannon
- Postdoc Benefits – Open Enrollment
- Winter Holidays & Winter Closure for Postdocs - Annelies
- Verifications – Annelies
- Upcoming Trainings – Annelies
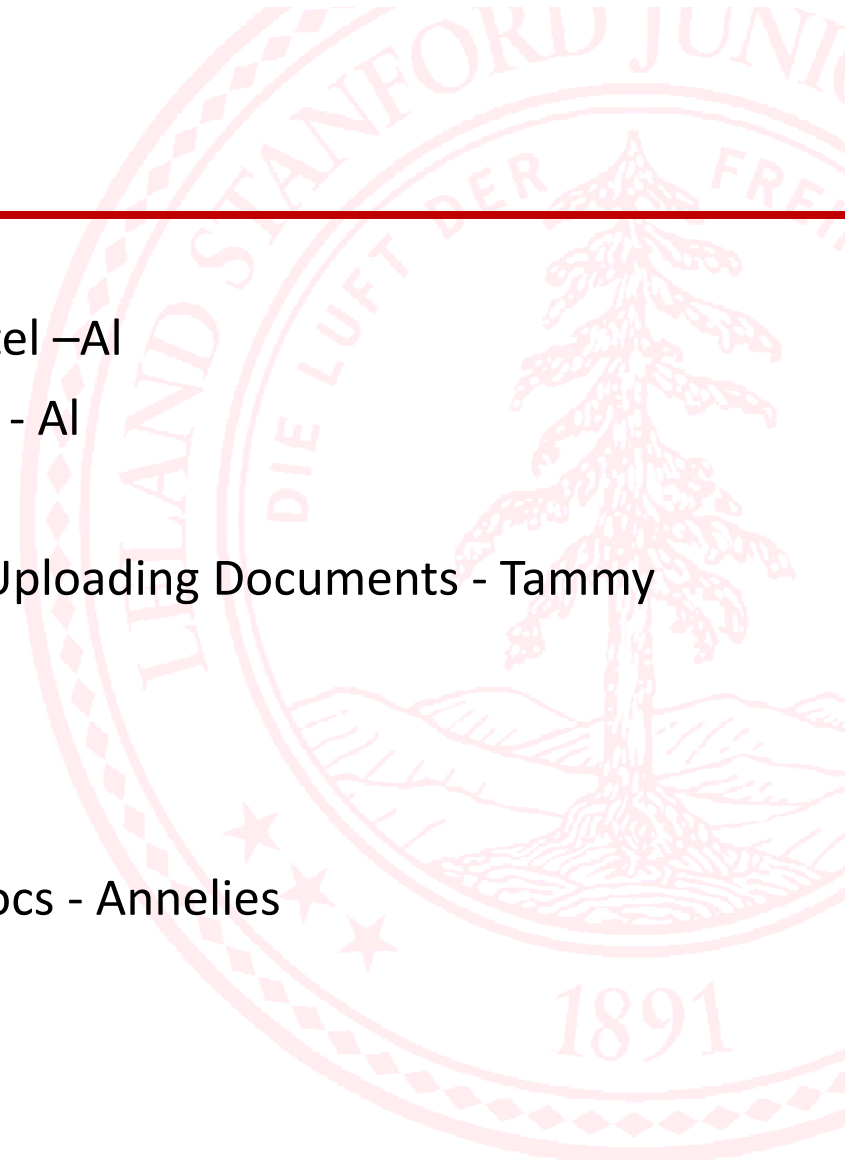
Winter Closure Deadlines for OPA and Bechtel

Al Murray

Winter Closure Deadlines

- The following deadlines apply to transactions that need to be reviewed and processed prior to the winter closure:

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- Initial Postdoc Appointments (Recommendation Form) and DS-2019 with a January start date: **December 5th** in order to meet Bechtel's deadline of December 12th

- Appointment Extension (Change Form) and Extension of DS-2019: **December 10th** in order to meet Bechtel's deadline of December 17th

- Changes in start date* or early termination and the accompanying amendment of existing DS-2019: **December 10th** in order to meet Bechtel's deadline of December 17th

- *If there is a change in start date, process a Change Transaction to indicate new start date after Recommendation Form has been approved and record loaded to PeopleSoft.*

Winter Closure Deadlines

- Initial Appointments (Recommendation Form) or Extension of Appointment (Change Form) for holders of H1B visas**: **November 26th** in order to meet Bechtel's deadline of December 3rd.

- ***This applies to petitions that do not require Review Board decision. Please contact Tammy Wilson, tjwilson@stanford.edu, with questions.*

- US citizens or permanent residents only: any/all transactions submitted by **Wednesday, December 19th** will be approved and a PeopleSoft student record created/updated no later than the end of business on Friday, December 21st.

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- OPA reviews and approves appointment actions (new appointments, terminations and changes) within five business days from receipt, provided that the submissions are accurate and complete.

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- International Scholars require additional processing steps of the related visa documents in two offices, so additional time has been added to the deadlines listed above to allow for the full review and approval process to take place.

Unlisted University

Al Murray

Unlisted University

- PD Web Forms populates PeopleSoft and must contain the correct institution for University records.

- Check Information Sheet – if you see "Unlisted University" for the school but the diploma shows a known school you must **return** the Information Sheet to the invited Postdoc. (Do not approve, OPA cannot fix it.)

- Example: Invited postdoc searches for "Oxford University" in SecurePortal, but the system only has the official name "University of Oxford.

- If it is a truly unknown university, please enter "Unknown University" in the Notes to Approver section of the Recommendation form when approving it to send to OPA.

# Back-up Approvers in Workflow

Al Murray

Back-up Approvers in Workflow

- The Workflow software used by Administrative Systems for PD Web Forms does not have a proxy approver functionality.

- In planning for vacations, leaves, or unexpected absences, please consider having additional staff assigned in each role for PD Web Forms.

Recommendation Web Form: Uploading Documents

Tammy Wilson
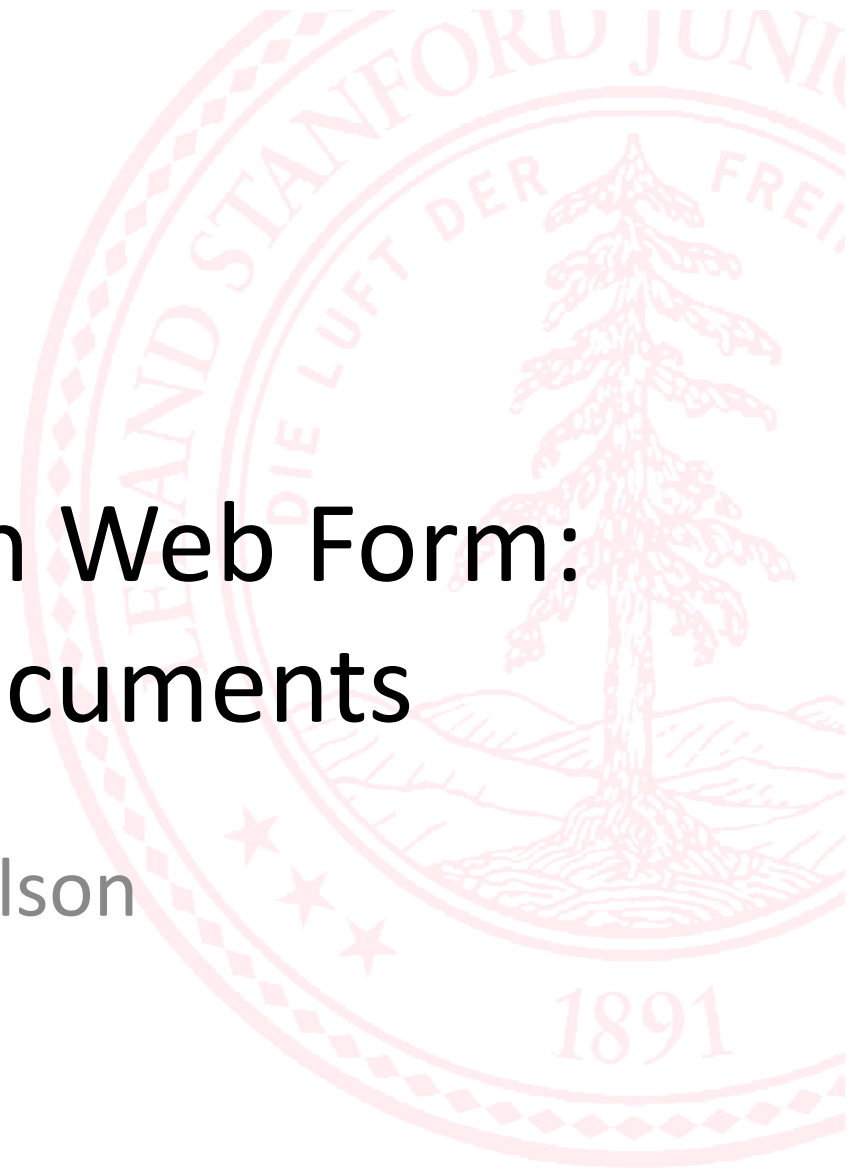
Rec Form: Uploading Documents

- Supporting documents can be added to a saved or submitted Recommendation Form at any time, even **after** workflow approvals are complete.
  - In AXESS, go to Postdoc Administrative Forms link
  - Click "Recommendation Form"
  - Enter First, Last Name of Postdoc in search fields
  - Click "Search"
  - In Search Results, click on the transaction ID
  - In the Recommendation Form scroll down to the Supporting Documents section, browse and upload

NSF & NIH Survey

Shannon Monahan

NSF-NIH GS Survey

- Annual survey which compiles information on graduate students, postdoctorates, and other doctorate-holding nonfaculty researchers across colleges and universities.

- All science and medical-related departments are required to participate.

- Logins will go out to department administrators early to mid-December.

- ReportMart1 reports will be made available to assist in data compilation.

- Brown bag session for GSS administrators?

Tuition Reminders

Shannon Monahan

Tuition Reminders

- Tuition/Reg fees = $125/qtr for ALL postdocs

- Payment must be entered by admins in GFS
  - If postdoc has any salary payments
    - TAL is automatically generated on the Assist TAL tab
    - Must still be <u>C</u>ompleted & <u>A</u>pproved by admin
  - If postdoc has no salary payments
    - TUT must be manually entered on the FLSHP Tuition tab

- TAL trumps TUT

Tuition Reminders

- New report in ReportMart1 underway for **Outstanding Tuition**!

- Notice/Job Aid will be sent out after it has been tested and released
  - Anticipated completion date: early December 2012

- Will include information such as:
  - EmplID
  - Name
  - Acad Program & SubPlan
  - Quarter
  - Tuition Balance Due

Postdoc Benefits – Open Enrollment

Sandra DeGaine

2013 Open Enrollment

- Last day to make changes: Thursday, November 15th

- Open enrollment packets received last week, confirmation statements mailed in Dec.

- Rates for postdocs with dependents have decreased significantly

- Family Healthcare Fund ends 12/31

Benefits orientation for new postdocs

- Required within 30 days
- Exceptions on case by case basis only for certain PAIRE and VA postdocs
- All postdocs expecting to waive must still attend a session prior to approval of waiver
- Department administration is welcome to attend

Benefits Procedures for Winter Closure

- All emails to postdocbenefits@stanford.edu will be reviewed daily (M-F), only urgent/critical emails will receive a response. If the email can wait until 1/7, it will.

- Phone and Email out of office messages will have the information postdocs need to contact the insurance carrier if assistance is required.

Maternity disability

– 2013 group information sessions are scheduled for: 1/17, 3/14, 5/16, 7/18, 9/19, 11/14

– Individual meetings will continue for 2013 but will be scheduled through an online registration system.

- Email from Sandra to postdoc, postdoc checks system for available dates and contacts department admin to confirm availability, postdoc registers and receives confirmation email.

Winter Holidays & Winter Closure for Postdocs

Annelies Ransome

Holidays and Winter Closure for Postdocs

- Postdocs observe University designated holidays and winter closure dates.
  - Holidays may *NOT* be covered with paid sick or vacation days.
- Postdocs may work remotely, without taking vacation days, with prior PI approval.

- Holidays and Winter Closure Schedule
  - Thanksgiving Holiday: Thursday, November 22 and Friday, November 23, 2012
  - Monday, December 24, 2012 – Designated Holiday
  - Tuesday, December 25, 2012 - Designated Holiday
  - Wednesday, December 26, 2012 – Paid day off if lab is shutdown
  - Thursday, December 27, 2012 – Paid day off if lab is shutdown
  - Friday, December 28, 2012 – Paid day off if lab is shutdown
  - Tuesday, January 1, 2013 –Designated Holiday
  - Wednesday, January 2, 2013 – Vacation day/unpaid time off if lab is shutdown
  - Thursday, January 3, 2013 - Vacation day/unpaid time off if lab is shutdown
  - Friday, January 4, 2013 - Vacation day/unpaid time off if lab is shutdown

Verification Requests

Annelies Ransome

Verifications

- OPA Website: http://postdocs.stanford.edu/about/verifications.html

- **OPA Processes:** *Postdoc Appointment Verifications and Postdoc Loan Deferments only*.
  - OPA *cannot* verify fellowships for Stanford University Hospital programs, HHMI, departmental programs, or other types of appointments or employment.
- **Postdoc Benefits Verification Requests:** Please send to the Postdoc Benefits team at their secure fax, (650) 723-7766.
- **Postdoc Home or Auto Loan Documents**: Postdocs needing appointment data for home or car loan paperwork work with their departmental postdoctoral administrator (*you*).
- **How to verify other types of appointments and/or employment at Stanford:**
  - Stanford Employment (staff)
  - Stanford Degree
  - Stanford Medical Staff
  - Residency and Fellowships: please contact the Stanford School of Medicine Department directly

Upcoming Trainings

OPA

Upcoming Trainings

- **ClearBenefits Training (Register in STARS)**
  - Weds, December 5th, 1:30-3:00pm, 1215 Welch Road, Mod A Conf Rm.
- **PD Web Forms Training (Register in STARS)**
- **Policies and Procedures (Register in STARS)**
- **Open Labs for PD Web Forms and/or GFS (Drop-in):**
  - First Fridays of every month, 9-noon in 427 Arguello Way (exception: open lab on Jan. 11th, 2013)

Questions?

Happy Hoildays!