Postdoctoral Administrators Quarterly Meeting

November 2, 2010
10:00 a.m. – 11:30 a.m.
Clark S360

Agenda

1. Policy and Procedure Updates

   - Out of state requirements: payroll and mention in offer letter

   - October 1 Funding Adjustments

2. 2011 Benefits – Open Enrollment

3. Clear Benefits
4. New Initiatives Update:

   - PeopleSoft Project

   - Emergency Fund for Postdoc Families

5. Winter Closure
6. Holiday Policy for Postdocs
7. Open Forum: Q & A
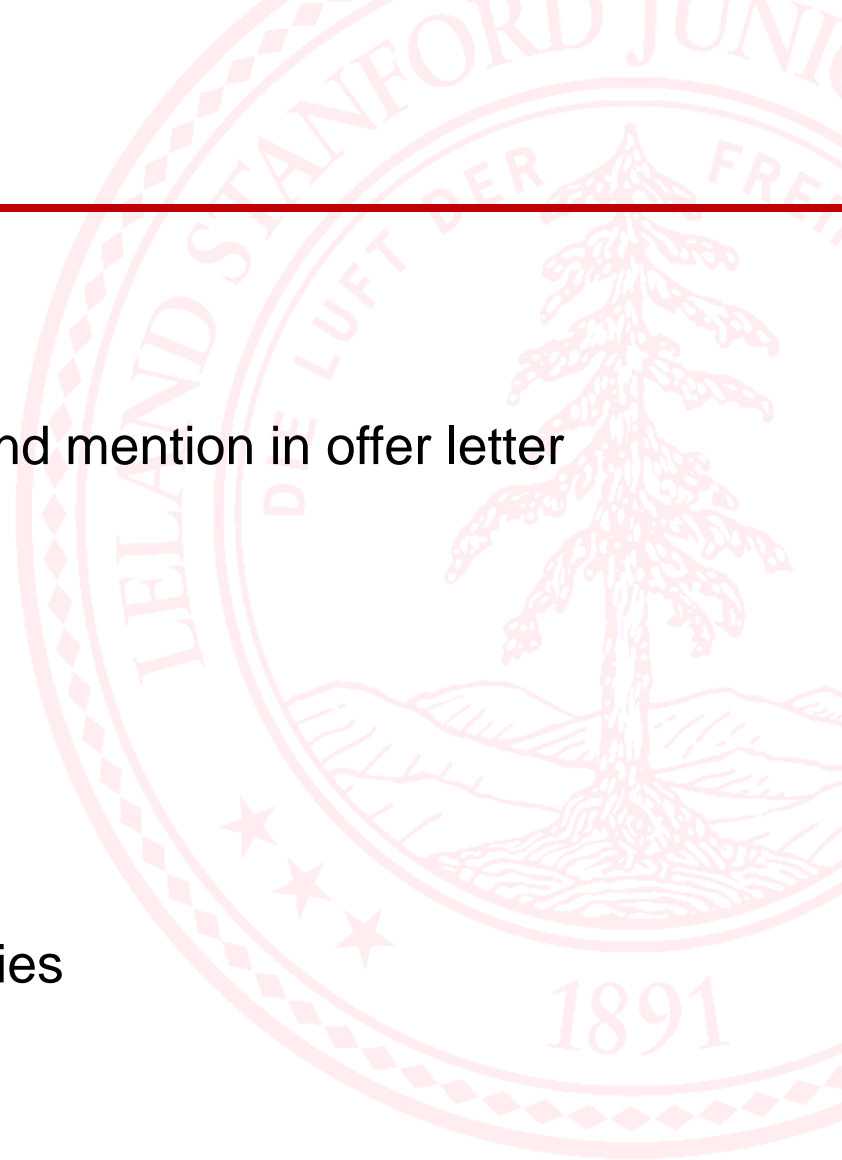
Policy & Procedure Updates

- **Postdoctoral Scholars Who Work Out-Of-State**

  - **Work location/duration must be mentioned in the Offer Letter – List in the second paragraph, "During this appointment…"**

  - **Departments must notify payroll when they have an employee (or postdoc paid a "salary" through Stanford Payroll) assigned to work out-of-state.**

  - **The link to the Out-Of-State Payroll Approval Form is available here:** http://fingate.stanford.edu/docs/approval_out_state_hire.pdf.

October 1 Funding Increases

- See the September 9 memo regarding October 1 increases for postdocs

- The October 1 adjustment is NOT discretionary: All postdocs who are not funded at their appropriate level on October 1 must be adjusted, regardless of hire date or funding source

- Review All your postdocs. Make adjustments: it's university policy

- Refer to the Salary Calculator online

2011 Benefits – Open Enrollment

- Please see the Benefits presentation slides included in this blog.

Clear Benefits

- ClearBenefits system went live 10/11/10
- All admins who had access to BISNet received instructions on their new logins for ClearBenefits
- Everything should function in the same manner as BISNet
  - Email Shannon Monahan at smonahan@stanford.edu if you come across something not working as expected

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/DFA/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

- For Administrators – all of the following:

    1. PeopleSoft Concepts and Compliance (online)

    2. PeopleSoft Student Records (online)

    3. 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 Winningham (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**

Emergency Fund for Postdoc Families

Purpose: To mitigate the impact of the 2011 Stanford medical plan increase in costs for postdocs with dependents.

Process: Application from postdoc that will include tax return and household income information

Application will be accepted quarterly.

Announcement, further information and application forms will be posted on the OPA website shortly.

Decisions about assistance in first quarter of 2011 will be made before Open Enrollment Period closes.

Winter Closure – Key Dates & Deadlines

- **Last Business Day in 2010 for OPA:**
   Friday, December 17, 2010

- **OPA Will Be Closed:**
   December 20 – December 31, 2010

- **OPA Will Reopen:**
   Monday, January 3, 2011
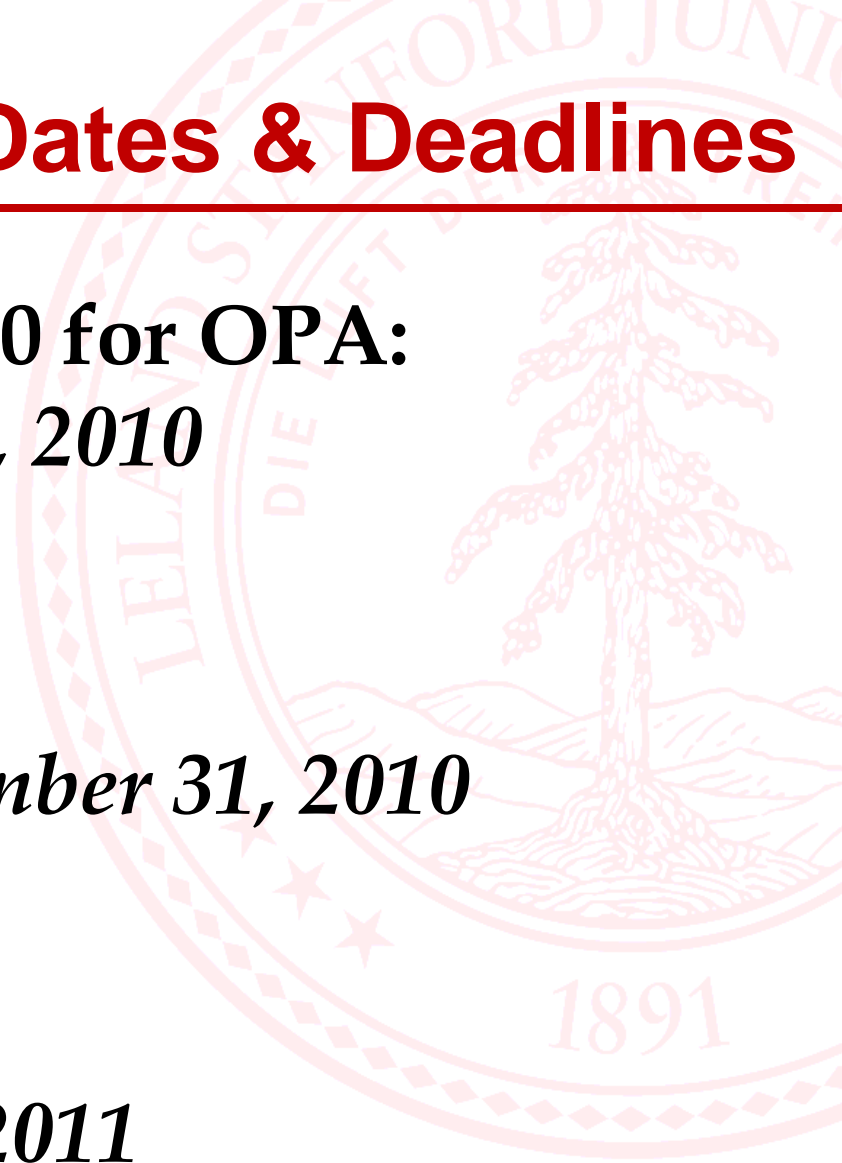
Winter Closure – Key Dates & Deadlines

Deadlines to Submit Complete Appointment Paperwork to OPA for Processing Before Winter Closure:

- Remember - 8 weeks is the <u>minimum</u> required processing time for new postdoctoral appointees requiring visas.
  - Deadline for international scholars: *November 17, 2010 (changed from 11/05/10)*
  - Deadline for US citizens or international scholars with valid EAD: *December 3, 2010*

Winter Closure – Key Dates & Deadlines

- **Deadline to Submit Any DS-2019 Initial or Extension Requests to OPA for Processing Before Winter Closure:**
  - *December 1, 2010*
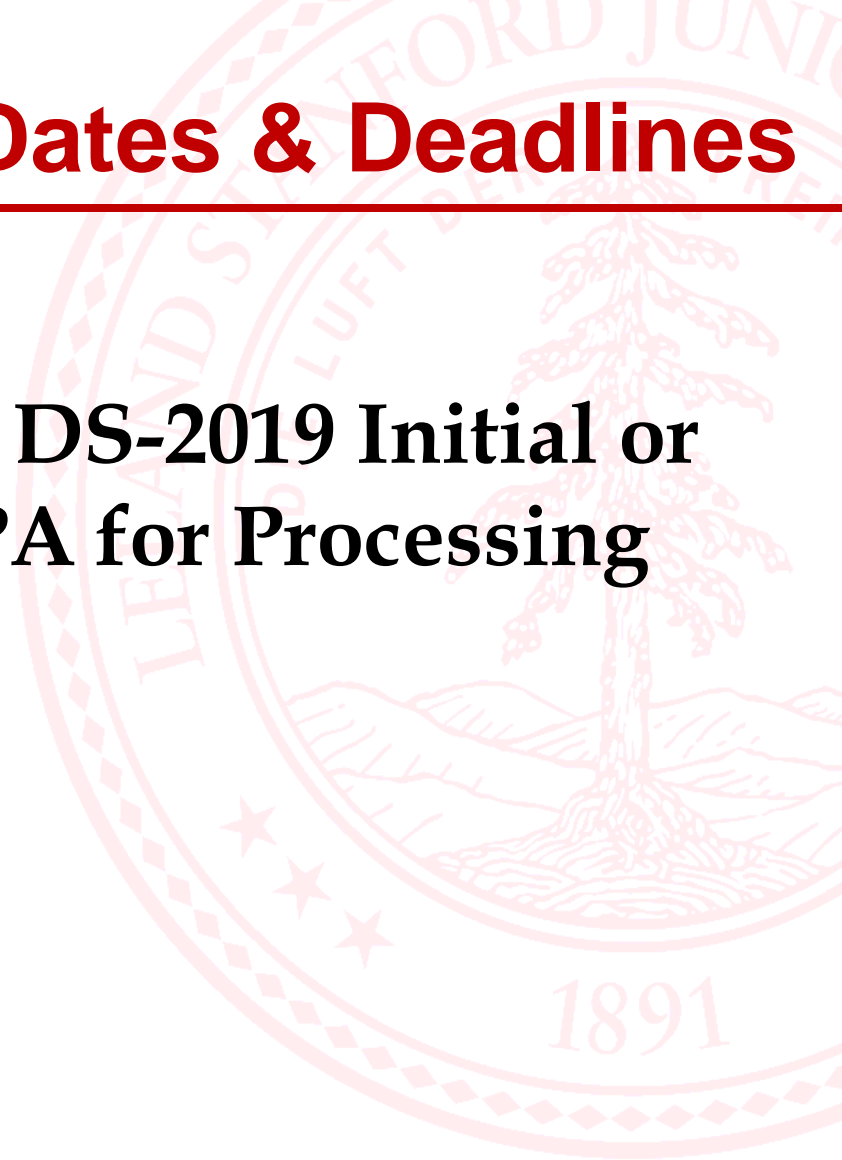
Winter Closure – Key Dates & Deadlines

- **Arrival Confirmations for International Scholars Arriving Late November or December 2010:**
  - Must be received by Bechtel by *December 14, 2010*
  - <u>DO NOT</u> let your postdoc forget and be unable to confirm arrival during Winter Closure
  - Amendment requests (for program start date changes) must be requested by Department and received at Bechtel by *December 10, 2010*

Holiday Policy for Postdocs

•During the Winter Closure period, three days are designated university holidays:

    Thursday, December 23

    Friday, December 24

    Friday, December 31

• Postdocs observe the official University holidays.

• Observance may be done on the holiday days or at a time agreeable with the PI's designated holiday lab schedule.

Holiday Policy for Postdocs

Labs with activities and responsibilities that are critical will remain open for all or part of the Winter Closure period (i.e., clinical units, lab animal facilities, some research labs, Libraries, etc.)

The mandatory paid time off and use of vacation days required from staff during Winter Closure do not apply to postdocs

You may not require postdocs to cover the three designated holiday days with their accrued days of paid leave.

Holiday Policy for Postdocs

- Postdocs may request paid time off from their annual balances through the usual channels for the days other than the designated holidays.

- Postdocs may also accomplish their assigned work without taking leave, from remote locations during Winter Closure if their labs are: not fully staffed or closed, and their PIs approve of this arrangement.

- If neither paid leave nor remote work arrangements have been approved, then postdocs are expected to report daily except for the designated days during the closure period when the laboratories will be completely closed.

Open Forum

Questions?

Askjane.stanford.edu

postdocaffairs@stanford.edu