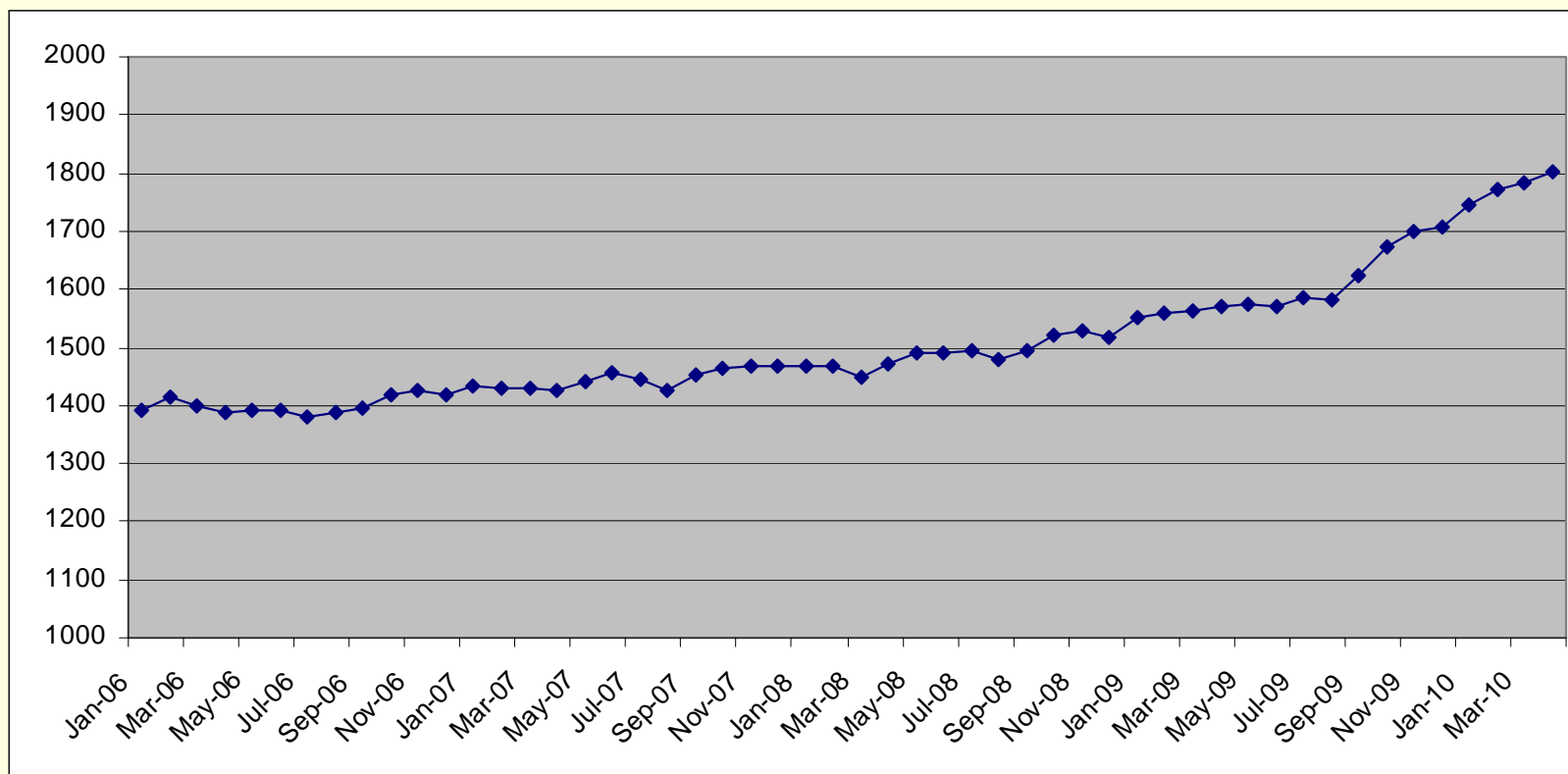


---

# **Quarterly Postdoc Administrator's Meeting**

Monday, April 19, 2010  
Office of Postdoctoral Affairs

# Postdoc Count by Month



# OPA Office Closure

---

- OPA will be working remotely on the following dates:
  - Friday, April 23<sup>rd</sup>
  - Monday, April 26<sup>th</sup>
  - Tuesday, April 27<sup>th</sup>
  - Wednesday, April 28<sup>th</sup>
- *Thursday, April 22<sup>nd</sup>*
  - *Morning: in office, but packing*
  - *Afternoon: computers will be packed up*
- Available by email only and for limited urgent appointments
- **Reminder:** Do not send anything via fax during this time (*as the fax machine will not be hooked up*)

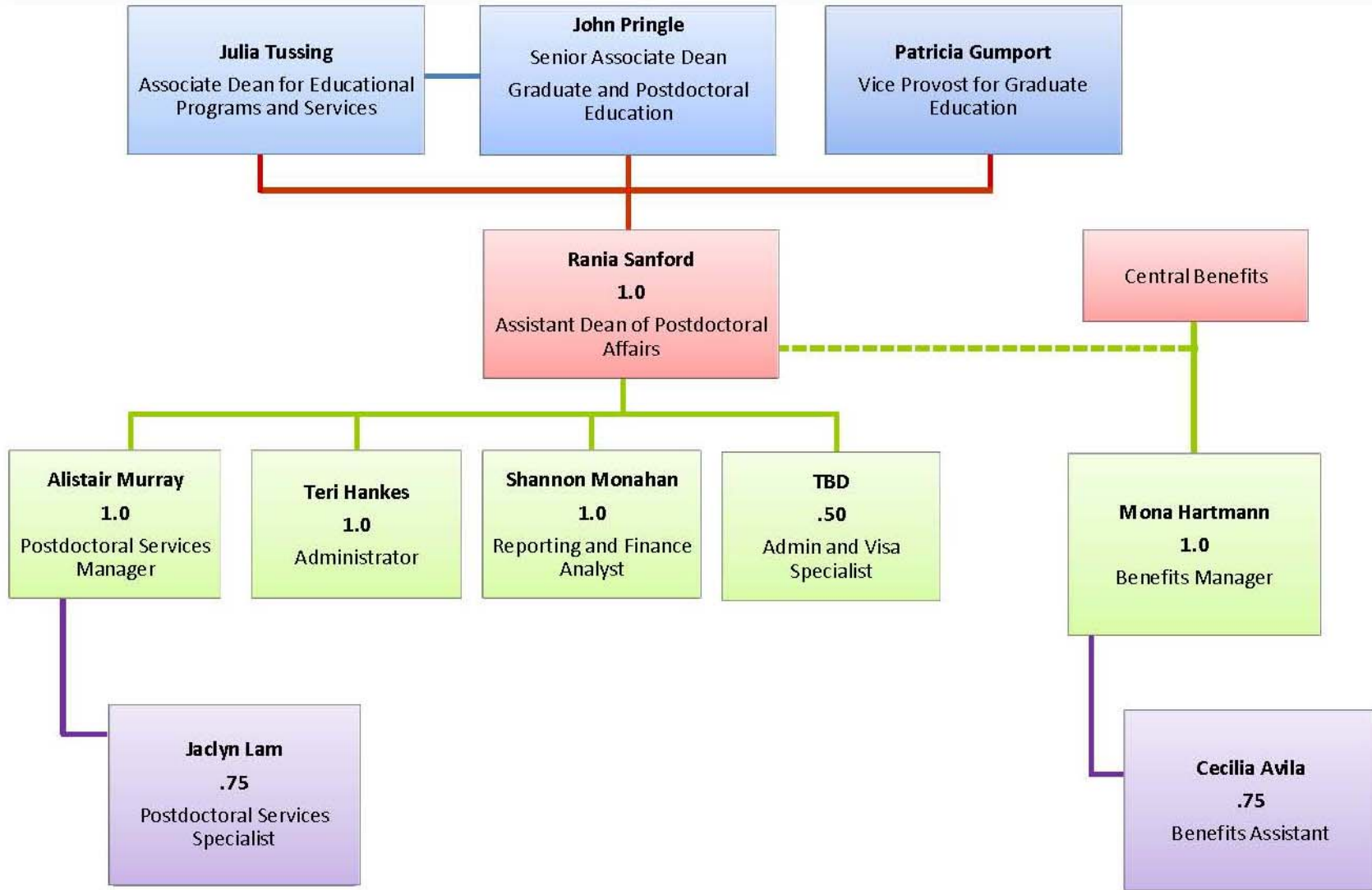


# OPA Updated Staff Roles

---

- Staff roles and responsibilities have been revised in order to meet the increased number of postdocs, new programmatic needs and consolidate job functions
- Always use [postdocaffairs@stanford.edu](mailto:postdocaffairs@stanford.edu) for your inquiries. All staff check that email

**Educational Programs and Services  
Office of Postdoctoral Affairs  
New Organizational Structure**



# Key Areas

---

- OPA Operations

- Postdoctoral Services Manager: Alistair Murray:

- Oversight of operations: all (re)appointments and J-1 visas
    - Appointment review and approvals
    - Policy exceptions
    - Administrator and faculty advising

- Postdoctoral Services Specialist: Jaclyn Lam:

- Completion of appointment paperwork.
    - Creation of records in PS

# Key Areas

---

- Administration/Business Manager: Teri Hankes
  - School of Medicine Fellowships (pre-award)
  - Website
  - OPA administration
  
- Financial and Reporting Analyst: Shannon Monahan
  - BISNet and Fellowships (post-award)
  - Internal Audits and Compliance
  - Systems– technical lead
  
- In Progress: Hiring of Administrative Associate

# Highlights from the Last Newsletter

---

- Temporary suspension of the five-year limit has been extended through Sep 30, 2011
- 2010 minimum funding levels for research scholars have been announced
- Clinical Fellows must be paid according to the Hospital's PGY scale
- The Salary & Appointment Calculator has been updated for 2010



# Salary Calculator

---

**[Demo]**

# Postdoc Administrator Blog

---

- For all newsletters and memoranda sent out by OPA:

**<http://postdocs.stanford.edu/admin/blog/>**

# Revised Forms

---

- Recommendation Form \*
  - Prior experience
  - Support/Funding breakdown
  
- Information Sheet
  - Prior experience
  - Drop-down for Ethnicity
  
- Recommendation Form for Clinical Trainees
  - Combines Recommendation Form & Patient Care Contact Form for trainees with Patient Contact

\* For postdoctoral research scholars and clinical Psych postdocs

# Tips, Tricks, & Reminders

---

- AKA: Things we really want to reiterate but know that no one would ever read if they were put into one giant, long email so instead were put into one, giant long PowerPoint presentation for a meeting being held next to a coffee shop in hopes that most (or all) will at least take away one new piece of information this early in the morning.

# Postdoc → Research Associate

---

- Two sides to PeopleSoft: SA and HR
  - SA data is administered by OPA
  - HR data is driven by GFS
- Even if the postdoc is terminated on the SA side, the postdoc will still show as active on the HR side until the next GFS process is run
  - If a postdoc and their payline ends on 11/30, GFS sends out that information for them to be paid on December 7th. It's not until the file that is run on Dec. 15th for a Dec 22nd paycheck (where GFS doesn't have anything to send over on that postdoc) that PeopleSoft HR updates the postdoc to "terminated". The postdoc looks active in PeopleSoft HR until it receives the file weeks later that shows the postdoc isn't in it which then sets them to "terminated".

# Contacting OPA

---

- If you send an email to [postdocaffairs@stanford.edu](mailto:postdocaffairs@stanford.edu), no need to send additional cc:'s to individuals within OPA; it creates copies and can become confusing

# Using Headers

---

- [New Appointment] Last Name, First Name...
- [Reappointment]
- [Transfer]
- [Visa]
- [Termination]
- [Benefits]
- [CAP] (Community Academic Profile)
- [LOA]
- [Misc]

# Sending Scanned Documents

---

- Send all appointment documents in **ONE pdf** (if possible)
  - We can approve emails with large files
- Send electronic documents directly from your own email account first and then forward to OPA rather than directly from the scanner/copier OR cc: yourself on all communications
  - If the OPA email address was entered incorrectly, notices that the email bounced are not received
  - By sending it to your account first, you can ensure that you get any notices and/or have a copy of the email being sent as confirmation

*If we didn't get it, we don't know that we didn't get it.*



# Turnaround Times

---

- New Appointments
  - Due 4 weeks prior to start date (no visa request)
  - Due 8 weeks prior to start date (with J1 visa)
  - Reviewed ..... (AI?)
- Visa Extensions **MUST** be accompanied by a reappointment letter
  - Due one week prior to reappointment start date
- Terminations
  - Due at least two weeks prior to termination date
  - Processed at the end of the month by Benefits
  - Processed in about a week in PeopleSoft SA
- Responses to your emails: within 48 hours

# Amendments to Letters

---

- Do not reproduce an original document that has been signed.
- Send in an amendment letter for both Offer Letters and Reappointment Letters
- Sample Wording:
  - Begin with: “This is an amendment to your [original offer letter/reappointment] dated [date].”
  - Note change:
    - Changes in dates of (re)appointment
    - Language omitted
    - Salary change
  - End with: “All other terms and conditions of your original offer letter dated [date] remain the same.”

# Reappointment Letters

---

- Provide the annual funding as noted in the required template
- Send in the reappointment letter prior to submitting the visa request in order to avoid having to make any changes to the DS-2019 request
- Funding in DS-2019 extension should match the annual funding listed in the reappointment letter
- DATE reappointment letters
- You may omit the mention of an October 1 increase if the reappointment is going to end prior to October—
  - i.e. four-month reappointment starting April 1 and ending July 31.

# Outside Funding

---

- Award letters should be attached to reappointments
  - remember to enter it in GFS as an Info-Only line
- Discuss with the postdoc who will be responsible for the \$125/qtr tuition (registration) fee prior to the start of their appointment

# GFS Entry

- If you have an 32-hour salary line and an 8-hour salary line, both must be entered using Assist Type RAF
- Info Only lines need to be entered in GFS in ALL cases where the postdoc is receiving outside pay

Enter Fellowship Stipend														
Entry    Quarterly/Notes    WF Transaction														
Aid Seq	Ident	'Pay Org	Disb Plan	Monthly Amount	Start Date	End Date	Termination Date	Stipend Total	Detail	Info only	Status	Description	Approval Status	
STP001	example	VAAA	NM-Monthly	1000.00	10/01/2005	09/30/2006		12000.00	Detail	<input checked="" type="checkbox"/>		Pending	Pending	

# Reimbursements

---

- Moving expenses for new postdocs
  - should be paid out as a one-time bonus in GFS as it is considered taxable income
- Insurance costs
  - the postdoc portion of insurance premiums should be paid out in GFS as it is considered taxable income
  - (the department portion is paid via BISNet)

# Getting Access to PeopleSoft

---

- Fulfilling PeopleSoft Training Requirements
  - <https://www.stanford.edu/dept/as/sandhr/learnps/0908prereqs.html>
- Following training, your manager must send an email to obtain the actual access for **Student Records, Graduate Admissions, and/or GFS**
  - Email contact list by School:  
<https://docushare.stanford.edu/dsweb/Get/Document-68632/SA%20Authority%20Grantors.pdf>
- View-only access available

# Running Reports on Your Postdocs— All are in ReportMart

---

- Demographic, appointment, visa information, etc. can be acquired by running a report in Reportmart1, <http://reportmart1.stanford.edu>
  - Student Administration >
    - Student Records >
      - SR Postdocs >
        - Postdoctoral Data (PS\_SR033)

Click Option 1: Process Postdoc Query

1st prompt: click ignore

2nd prompt: click Active

3rd prompt: click ignore



# Visas

---

- Visa start and end dates must coincide with the initial appointment dates (for new postdocs) and with the reappointment dates (for continuing postdocs)
- Remember that the funding on the visa form must be calculated for the duration of the visa
  - a 2-year visa must list 2 years worth of funding (not the annual funding)
- Visa extension funding will start on the first day following the end date of the prior visa

# Verification Letters

---

- Sample wording for future employment:

This is to verify that Dr. **[First] [Last]** is currently appointed in the Department of **[Department]**, Division of **[Division]** at Stanford University. **[His/her]** appointment as a non-matriculating student began on **[Start Date]** and is expected to continue through **[End Date] [with the opportunity for reappointment]**. Please feel free to contact me with any questions.

*Department Administrators may issue this letter upon verification that a current appointment/reappointment letter is on file with the department and OPA.*

# Worker's Compensation – FYI

---

- Postdocs who are injured at work:
  - and receive salary
    - complete the SU-17 form
      - <http://www.stanford.edu/dept/Risk-Management/docs/forms/su-17.html>
  - and receive stipend
    - complete the SU-17B form
      - <http://www.stanford.edu/dept/Risk-Management/docs/forms/su-17b.html>
  
- Completed forms should be sent to Risk Management
  
- For more info, contact:
  - Janet Bleecker, Risk Management Workers' Compensation; [bleecker@stanford.edu](mailto:bleecker@stanford.edu)

# BISNet

---

- Enter a Guarantee Account
  - Required for all departments as part of the transition to ClearBenefits.
  
- “No Plan” across the board means that the postdoc has not made their insurance elections yet
  - They have 30 days from the start of their appointment to do so. You will know that they have made their elections when, at the very least, the Disability drop-down menu shows up since all postdocs are required to have Disability coverage.
  
- Dental and Vision do not start until the 1st day of the month *following* their appointment start date.

Note: Expect an early due date for May PTAs

# BISNet → ClearBenefits

---

- Change is coming...

# Community Academic Profiles (CAP)

---

- Faculty Profiles only list postdoctoral advisees currently appointed through OPA (i.e. no HHMI, SH&C, LPCH fellows or Research Associates)
- Be sure faculty administrators and postdoctoral scholars in your department refer CAP issues to you to troubleshoot before you contact OPA
- If faculty sponsor is not postdoctoral advisor, Department Recommendation form must have Research Mentor otherwise CAP will be incorrect

# Termination Forms

---

- If revising a Termination form, send the old one over with:
  - Old date crossed out
  - New date entered next to it
  - Your initials next to the new date
  - Write “REVISED” at the top

This helps us locate the old form without having to call the administrator.

# Certificates

---

- Printed certificates need to be sent to the department (admin) first in order to get the appropriate signatures
- After the signatures have been acquired, it can then be mailed to the postdoc
  - Keep their forwarding address on hand for this reason



# Posting Postdoc Vacancies

---

- Go to our website under Prospective Postdocs:

[http://postdocs.stanford.edu/secure/newPosition\\_form.htm](http://postdocs.stanford.edu/secure/newPosition_form.htm)

- I would like to post an announcement for a new Postdoctoral position in my department
  - I would like to update an announcement I've already posted
  - I have filled a Postdoctoral position that was posted on this site
- 
- Contact: Teri Hanks, [thankes@stanford.edu](mailto:thankes@stanford.edu)

# Tricks

---

- When typing in the first part of a Stanford website while on campus, you do not have to type in the whole address
  - i.e. in the address bar type in “postdocs” and press enter to get to <http://postdocs.stanford.edu>
  - In the address bar type in “ora” and press enter to get to <http://ora.stanford.edu>

# Tricks

---

- Add frequently visited site to your Bookmark Toolbar in Firefox
  - i.e. OPA's Forms Page
  - <http://med.stanford.edu/departments/>
  - <https://stanfordwho.stanford.edu/>
  - Clark Center Nexus menu

# Tips, Tricks, & Reminders

---

**Questions?**