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# **GFS Stipend/Salary Entry & Policy for Postdoctoral Scholar Administrators**

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**Beckman B060  
9:30 am – 11:30 am  
October 7, 2015**

# Agenda

- Policy/Background
  - OPA & Department Responsibilities
  - Navigation
  - Aid-Year Activation in GFS
  - Item-Type Requests for New PTAs
  - Postdoc Compensation
  - Postdoc Tuition
- GFS Aid Entry
  - Examples
  - Late Entry & Retroactive changes
- Tips & Miscellaneous
- Minimum Funding Guidelines
- GFS Resources/Help

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# Department Responsibilities

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# Prior to Entry

## ■ OPA Tasks:

- ❑ After OPA approval, OPA will load the record into PeopleSoft
    - ❑ Student ID is created for new postdocs
      - ❑ “Returning” postdocs retain their original Student ID
    - ❑ Term activation is completed in PeopleSoft
    - ❑ ClearBenefits record is created for postdoc insurance benefits
  - ❑ Note: Postdoc Webforms Workflow Approval does not automatically create student record
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# Prior to Entry

## ■ Department Tasks:

- ❑ Aid-Year Activation in GFS
  - ❑ Item-Type Requests for New PTAs
  - ❑ GFS Entry of Salary, Stipend and Information-Only lines
  - ❑ Ensuring minimum required funding is being met
  - ❑ Collection of I-9 documents and forwarding to Payroll (and follow-up with Postdocs for missing I-9 documentation)
  - ❑ Entry of PTAs in ClearBenefits for postdoc insurance payments
  - ❑ AND Postdoc termination processes including submission of Termination Form in Postdoc Webforms system
    - ❑ Terminating a postdoc's GFS lines does not terminate a postdoc's student record in PeopleSoft
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# Navigation

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# Navigation

- After logging into Axess, hover over CS Admin and click on STF Grad Financial Support

The screenshot shows the AXESS navigation interface. At the top, the AXESS logo is on the left, followed by a series of menu items: MY AXESS, EMPLOYEE CENTER, STARS, OPA/BECHTEL CENTER, WORKFLOW HOME, ADMIN RESOURCES, CS Admin (highlighted), STARS Admin, and Admin Favorites. Below this is a 'Main Menu' dropdown. The main menu is organized into a grid of links. The link 'STF Grad Financial Support' is highlighted with a white background and a blue underline. Other links include STF Web Forms, Self Service, STARS Menu, Campus Community, Student Recruiting, Student Admissions, Records and Enrollment, Curriculum Management, Student Financials, Academic Advisement, Contributor Relations, Stanford Utilities, Set Up SACR, PeopleSoft, Worklist, Reporting Tools, PeopleTools, and My Personalizations.

MY AXESS	EMPLOYEE CENTER	STARS	OPA/BECHTEL CENTER	WORKFLOW HOME	ADMIN RESOURCES	CS Admin	STARS Admin	Admin Favorites
Main Menu								
STF Web Forms	Student Admissions	Contributor Relations	Worklist					
Self Service	Records and Enrollment	Stanford Utilities	Reporting Tools					
STARS Menu	Curriculum Management	<u>STF Grad Financial Support</u>	PeopleTools					
Campus Community	Student Financials	Set Up SACR	My Personalizations					
Student Recruiting	Academic Advisement	PeopleSoft						

# Navigation

The screenshot shows the AXESS navigation menu. The top bar contains the AXESS logo and a series of menu items: MY AXESS, EMPLOYEE CENTER, STARS, OPA/BECHTEL CENTER, WORKFLOW HOME, ADMIN RESOURCES, CS Admin (highlighted), STARS Admin, and Admin Favorites. Below this is a breadcrumb trail: Main Menu > STF Grad Financial Support. The main content area lists three items: STF Graduate Financial Support, STF Request Item Type, and STF GFS Web Forms.

- *STF Graduate Financial Support*: where most tasks are completed, including Aid Year Activation and GFS Entry
- *STF Request Item Type*: to create new item types for your PTAs (PTA/Exp type combination)
- *STF GFS Web Forms*: used to create off-cycle checks

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# *Aid Year Activation*

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# Aid Year Activation

- Postdoc must be Aid Year Activated by the department prior to entering pay lines into GFS

AXESS || MY AXESS EMPLOYEE CENTER STARS CENTER OPA/BECHTEL CENTER WORKFLOW HOME ADMIN RESOURCES CS Admin STARS Admin Admin Favorites

Main Menu > STF Grad Financial Support > STF Graduate Financial Support > Use ▾

[Aid Year Activation](#) Aid Entry Copied Aid By Template Id Disbursement Aid Seq Override

- Ensure the correct Home Department Mail Code is used

\*Mail Code:

\*Aid Year:  Acad Org: Billing Career: GR Tuition Grp: GR\_PD  
Institution: STANF PHYSICS Billing Term: 1162 TAL Cat: PD

*Term	Short Description	*Acad Career	*Home Org	Descr	*TAL Category
1162	15-16 Aut	GR	PHYSICS	Physics	PD

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# Aid Year Activation

- Financial Aid Office batch Aid Year Activates all active postdocs in August for the upcoming GFS Aid Year
  - Batch process assigns TAL categories based on the student's billing status for the upcoming GFS Aid Year
    - Should be reviewed each Autumn to ensure accuracy
  - Postdocs who begin their appointment in the Autumn and were Stanford graduate students in the preceding Summer quarter will need to have their Aid Year Activation updated (e.g. to TAL category PD, mail code, etc.)
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# Aid Year Activation of a New Postdoc

- Aid Year Activation may need to be done manually for one or two GFS Aid Years depending on the postdoc's Start Date and Term Activation
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# GRPD Aid Activation

- Allows for the transition of a Stanford student from a graduate student to postdoc in the middle of a quarter
- The department can enter postdoc pay lines and graduate student pay in the same quarter
- Postdoc tuition is suppressed for that quarter; graduate student tuition is charged. For aid entered in Aid Year 2015 or prior, unapplied aid will result if \$125 is paid for GRPD quarter!!

Should be used for **ONE QUARTER** only!

Corrections to this are messy.

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# GRPD Aid Activation

- Job Aid for GRPD Aid Year Activation can be found on the GFS Policy Website here:

<http://gfs.stanford.edu/gfsjobaids.html>

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# GRPD Aid Activation

## ■ Adjusting Aid Year Activation

1. Student finishes PhD degree at Stanford on January 14<sup>th</sup>
2. Begins postdoc appointment on February 1<sup>st</sup>
3. Continues as a postdoc through the rest of the year

### Aid Year Activate

Stanford, Jane

01111111



\*Mail Code:

Find | View All First 1 of 8 Last

\*Aid Year:  Acad Org: Billing Career: GR Tuition Grp: TGR\_ENG  
Institution: STANF MECHENGR Billing Term: 1108 TAL Cat: TGR

*Term	Short Description	*Acad Career	*Home Org	Descr	*TAL Category
1112	10-11 Aut	<input type="text" value="GR"/>	<input type="text" value="MECHENGR"/>	Mechanical Engineering	<input type="text" value="TGR"/>
<input type="text" value="1114"/>	<input type="text" value="10-11 Wtr"/>	<input type="text" value="GR"/>	<input type="text" value="MECHENGR"/>	Mechanical Engineering	<input type="text" value="GRPD"/>
<input type="text" value="1116"/>	<input type="text" value="10-11 Spr"/>	<input type="text" value="GR"/>	<input type="text" value="MECHENGR"/>	Mechanical Engineering	<input type="text" value="PD"/>

Customize | Find | View All First 1-3 of 3 Last

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# Item Type Requests for New PTAs

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# Item Typing PTAs

- New PTAs require that they be Item-Typed prior to use in GFS

The screenshot shows the AXESS system navigation menu. The menu items are: MY AXESS, EMPLOYEE CENTER, STARS, OPA/BECHTEL CENTER, WORKFLOW HOME, ADMIN RESOURCES, CS Admin, STARS Admin, and Admin Favorites. Below the menu is a breadcrumb trail: Main Menu > STF Grad Financial Support > STF Request Item Type > Use. A search bar contains the text 'Request Item Type Setup'.

- For postdoc GFS pay line entry, you may need:

Charge Priority	Description	Expenditure Type
RAF	Postdoc Salary	51210
RAFC	Postdoc Contingent Salary	51260
MONTHLY	Postdoc Stipend	57840
MONTHLY	Postdoc Travel/Supply Stipend (for taxable reimbursements)	57841

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# Item Typing PTAs

- Requests for Item Type Authority
  - Training is required: Complete 2 training videos
  - Complete the GFS Item Type Requestor Completion Certificate
  - Set up in Authority Manager
- Item Type requests are processed nightly



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# Postdoc Compensation

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# Paying Postdoctoral Scholars

- Postdoctoral Scholars pay must be supported by:
  - ❑ Stanford grants and contracts,
  - ❑ Training grants,
  - ❑ School or departmental fellowship funds,
  - ❑ External fellowships,
  - ❑ Or any combination of these sources
  - ❑ Note: Postdocs cannot be self-funding
  
- Funds entered in GFS will be:
  - ❑ Salary -- **Assist Salary** Tab
    - Based on a 40-hour work week
    - Assist Type RAF used if 20 or more hours salary (include all pay lines)
    - Assist Type RAFC used if less than 20 hours salary
  - ❑ Stipend -- **FLSHP Stipend** Tab
    - Used also for outside support

# Key Distinctions

## SALARY

- ❑ **ALLOWABLE** cost on research grants/ contracts
- ❑ Subject to tax withholding
- ❑ Fringe Benefits Rate (24.3% in 2015-16 for Postdoctoral Scholars whose salary accounts for at least 50% of total compensation)
- ❑ Receives W-2s
- ❑ Paid on the 7<sup>th</sup> and 22<sup>nd</sup> of the month

## STIPEND

- ❑ **NOT ALLOWED** on research grants/ contracts
- ❑ **ALLOWABLE** on Training Grants and Fellowships
- ❑ Not permitted for postdocs on H-1 (employment) visas
- ❑ Receives a letter from Payroll at calendar year end for tax purposes
- ❑ Paid at the end of the month

Having to change from one to the other can be very painful.  
Most funding sources will dictate how it should be paid.  
Always try to get it right the first time.

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# Compensation

## 1. Salary Only

- Pay line entry is made on the Assist Salary tab
- Use Assist Type RAF; Hours =40

## 2. Salary Only from more than one source

- Either: enter one GFS pay line with multiple details lines
  - Or: Enter multiple pay lines
    - Use Assist Type RAF for all lines
    - All hours must add up to 40
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# Compensation (cont.)

## 3. Stipend Only or Outside Funded

- Pay line entry is made on the FLSHP Stipend tab
- Check the Info Only box for all funding that is paid directly to the postdoc (and not through Stanford)

## 4. Stipend with a Salary Supplement

- If the salary > stipend
    - Salary line: use Assist Type RAF; hours calculated out of 40
  - If the salary < stipend
    - Salary line: use Assist Type RAFC; hours calculated out of 40
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# Compensation (cont.)

## Example:

Outside Fellowship paid directly to the Postdoc: **\$31,500/yr**

PI salary supplement: **\$18,500/yr**

Total Funding: \$50,000/yr

Hours salary calculated by:  $(\$18,500 / \$50,000) * 40 = 14.8$

**~ 14 hours (round down)**

In GFS, the administrator enters:

- On *FLSHP Stipend* tab: the **\$31,500** stipend as an **INFO ONLY** line
- On *Assist Salary* tab: a **\$18,500** salary line with Assist Type **RAFC** and hours = **14**

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# Information-Only lines

- Use them when:
    - ❑ a Postdoc is funded by an outside source, and
    - ❑ the money is NOT being processed through Stanford
  
  - Why?
    - ❑ To show accurate record of Postdoc compensation and ensure compliance with minimum support levels
    - ❑ It is taken into account during periodic compensation audits
      - ❑ Info Only lines are included in BI reports
    - ❑ Assists departments with budgeting
      - ❑ To plan for funding following the end of the external award
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# Information-Only lines

- How?
    - ❑ Enter as fellowship on FLSHP Stipend tab
    - ❑ Check the Info Only box
    - ❑ Will still need to click on the “Detail” button before completing
  - Does it still route for approval?
    - ❑ Yes, but only to Home Department Approver(s)
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# Entering an Information Only Line

Aid Year: 2014      Institution: STANF

TAL Category	Total Amt	Autumn PD	Winter PD	Spring PD	Summer PD
All FLSHP Stipend	67203.00	16650.75	17250.75	16650.75	16650.75

Select All

Complete

## Enter Fellowship Stipend

Entry    Quarterly/Notes    WF Transaction

Select	Aid Seq	Ident	*Pay Org	Disb Plan	Monthly Amount	Start Date	End Date	Termination Date	Stipend Total	Detail	Info only	Status	Description	Approval Status		
<input type="checkbox"/>	STP001	VA	VAAA	NM-Payroll	5550.25	10/01/2013	09/30/2014		66603.00	Detail	<input checked="" type="checkbox"/>	C	Complete	Approved	+	-
<input type="checkbox"/>	STP002	VPGE MM	UMAA	NM-Payroll	600.00	03/01/2014	03/31/2014		600.00	Detail	<input type="checkbox"/>	C	Complete	Approved	+	-

# Fringe Benefits Rates

- Full Postdoc Benefit Rate (24.3% for FY16) is charged to all salary entries with Assist Type RAF -- when salary accounts for *at least 50% of the minimum required salary* (at least 20 hours salary)
  - e.g. two separate salary lines, one 12 hours and one 18 hours, will be charged the full benefits rate
- Contingent Benefit Rate (8.8% for FY16) is charged to all salary entries with Assist Type RAFC -- when salary accounts for *less than 50% of the minimum required salary* (less than 20 hours salary)
  - e.g. one salary line for 10 hours (25% of total compensation) will be charged the contingent benefits rate

Assistantship Type – RAF or RAFC – controls the benefit rate.

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# Postdoc Tuition

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# Paying Postdoctoral Tuition Aid Year 2016 and After

Effective the Autumn 2015 quarter and thereafter, tuition is paid on behalf of ALL postdocs by the Provost or SOM Dean, regardless of funding (salary, stipend, outside-funded).

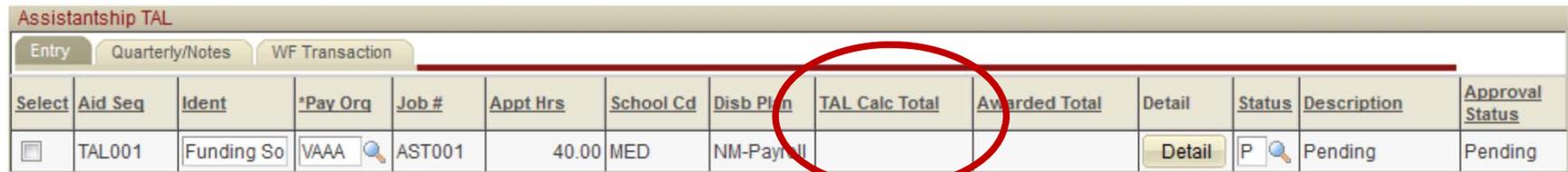
As such, payment of quarterly postdoc tuition for terms 1162-on will be automated and no longer be entered in GFS.

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# Paying Postdoctoral Tuition Aid Year 2016 and After

## Postdocs with Salary payment

1. Enter the Salary and Detail information on the Assist Salary tab.
2. Click on the Calc TAL button.
3. On the Assist TAL tab, the TAL Calc Total will be blank. Leave the TAL line in Pending/Pending status.



Assistantship TAL

Entry Quarterly/Notes WF Transaction

Select	Aid Seq	Ident	*Pay Org	Job #	Appt Hrs	School Cd	Disb Plan	TAL Calc Total	Awarded Total	Detail	Status	Description	Approval Status
<input type="checkbox"/>	TAL001	Funding So	VAAA	AST001	40.00	MED	NM-Payroll			Detail	P	Pending	Pending

4. Complete the Salary line on the Assist Salary tab and route for Approval clicking on the Save button.

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# Paying Postdoctoral Tuition Aid Year 2016 and After

## **Postdocs with NO Salary payments**

1. Enter the stipend or Info-only pay line on the FLSHP Stipend tab.
  2. Complete the pay line and route for Approval by clicking on the Save button.  
No further action is needed.
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# Paying Postdoctoral Tuition Aid Year 2015 and Prior

- A tuition/registration fee of \$125 per quarter is charged to all postdocs for all quarters they are appointed
- Fee is paid for on their behalf by the SOM Dean, University Provost, or by department/PI funds
- For any quarter:

	No salary entries	At least some salary
SOM	Must manually enter PTA on FLSHP Tuition tab <i>(SOM Dean's account)</i>	PTA automatically entered on Assist TAL tab <i>(SOM Dean's account)</i>
University	Must manually enter PTA on FLSHP Tuition tab <i>(Department or PI account)</i> <i>TU_ONLY, Exp Type: 57402</i>	PTA automatically entered on Assist TAL tab <i>(Provost's account)</i>

- TAL trumps TUT!

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# Paying Postdoctoral Tuition

## Degree-seeking Postdoctoral Scholars

- Postdocs with a dual appointment in a MS or PhD program follow alternative guidelines
  - Graduate-level tuition is charged instead of the \$125 postdoc fee for these terms. The \$125 charge is manually removed by the Registrar's Office.
  - Dual-career postdocs must complete the *Tuition Agreement for Students with Multiple Programs* form, obtain approval signatures from both departments and then OPA. OPA submits form to Registrar's Office.
    - [http://studentaffairs.stanford.edu/sites/default/files/registrar/files/multiple\\_prog\\_agree.pdf](http://studentaffairs.stanford.edu/sites/default/files/registrar/files/multiple_prog_agree.pdf)
  - Aid Year Activation may need to be reviewed
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# GFS Aid Entry

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# GFS System

- GFS Aid Year runs from October 1 to the following September 30
    - This is one month off of the Fiscal Year (Sept-Aug)
  - GFS Quarters are different from academic quarters
    - Autumn: Oct 1 – Dec 31
    - Winter: Jan 1 – Mar 31
    - Spring: Apr 1 – Jun 30
    - Summer: Jul 1 – Sep 30
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# GFS Aid Entry

- Disbursement Plan for postdoc stipend and salary should always be NM-Payroll
    - Postdocs are not paid on a quarterly or semester basis
  - Salary is paid 24 times a year (2x monthly on the 7<sup>th</sup> and the 22<sup>nd</sup>)

Stipend is paid 12 times a year (1x monthly on last day of month)
  - One can look up the Item Type in GFS by clicking on the magnifying glass under Detail on the aid line and searching by PTA
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# GFS Aid Entry

- Entering a Termination Date in GFS is not necessary if it is the same as the End Date
  - BUT you must submit a Termination Form to end the postdoctoral appointment
- After entering a salary line, but before approving it, you must **Calc TAL**
  - Aid Year 2015 and prior: Complete and approve TAL line
  - Aid Year 2016 and after: Keep TAL line in P/P; amount will be \$0 (or blank)

# GFS Examples

## ■ Example 1: Stipend Only

Postdoc awarded \$60,000 fellowship (stipend) from 6/1/15-5/31/16. Enter aid for GFS Aid Year 2016.

- ❑ Enter aid on FLSHP Stipend tab
- ❑ Monthly amount = \$5,000
- ❑ If outside-funded, check Info Only box and complete
- ❑ Else, click on Detail button and fill in
  - When entering detail, may need to click *Copy to all terms*
    - ❑ Will copy whole quarter amount to each quarter—if one quarter has only one month of pay, will need to manually adjust quarter amount
- ❑ Complete the aid line to route for approval

# GFS Examples

## ■ Example 2: Stipend with Salary Supplement

Postdoc awarded \$60,000 fellowship (stipend) from 6/1/15-5/31/16. PI supplementing with \$12,000 salary for total pay of \$72,000. Enter aid for GFS Aid Year 2016.

- ❑ Enter salary payment on Assist Salary tab
- ❑ Pay period amount = \$500 and hours =  $(12/60)*40 = 8$
- ❑ Assist Type = RAFC since  $< 20$  hours
- ❑ Click on Detail button and fill in
  - When entering detail, may need to click *Copy to all terms* – adjust amount of term as necessary
- ❑ Calc TAL
- ❑ Complete the aid line to route for approval

# GFS Examples

## ■ Example 3: Salary Only

Faculty Sponsor will pay postdoc a \$50,000 annual salary from two different sources (\$30,000 & \$20,000) for the period 11/1/15 – 7/31/16. Enter aid for GFS Aid Year 2016.

- ❑ Note the total is annualized, amount entered is prorated
- ❑ Enter salary payments on Assist Salary tab
- ❑ First pay line (\$30,000)
  - Pay period amount = \$1250 and hours =  $(30/50)*40 = 24$
  - Assist Type = RAF since  $> 20$
- ❑ Second pay line (\$20,000)
  - Pay period amount = \$833.33 and hours =  $(20/50)*40 = 16$
  - Assist Type = RAF
    - ❑ This is still RAF since the TOTAL hours over all salary lines  $> 20$

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# GFS Live Examples

- Example 3 (con't): Salary Only
    - Click on Detail button for each line and fill in
      - When entering detail, may need to click *Copy to all terms* – adjust amount of term as necessary
    - Calc TAL
    - Complete aid line and route for Approval
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# Multiple Detail Lines

- Can be used for Salary payments only
  - Dividing the cost using the detail instead of multiple aid lines means fewer entries
  - Less guesswork & fewer calculations
  - When there's a change, you only need to terminate and re-enter one aid line... sort of
  - NOTE: requires ALL financial approvers to approve before the aid line is *fully* approved
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# Using Multiple Detail Lines

- Single Aid Line

- Pay Period Amount = (Total Aid / 24) and hours = 40

Aid Year: 2014	Aid Seq: AST002	Amt Total	Autumn	Winter	Spring	Summer
		32495.36	12185.76	12185.76	8123.84	
Mochly-Rosen		Line Totals	12185.76	12185.76	8123.84	

**Term Distribution** Find | View All First 1 of 4 Last

Term: 1142 13-14 Aut 10/01/2013 12/31/2013

Allocate Charge By

Amount

Date

Copy to all terms

---

**Item Type Charging Detail**

Detail

Disbursement

Seq No	Start Date	End Date	Amount	Fund Src	Item Type	Project	Task	Award	Expend Type	Deptid (Task Org)	Charge Priority	Itm
1	10/01/2013	12/31/2013	6092.88		873100033911	1018485	112	PADAZ	51210	XAEY	RAF_SAL	Itm
2	10/01/2013	12/31/2013	6092.88		873100001885	1062740	101	KAHO	51210	XAEY	RAF_SAL	Itm

OK Cancel

# GFS Payline Termination

## ■ Example 4: Salary line changes

[Recall example 3] Faculty Sponsor wants to change the PTA for the second source of funding (\$20,000) beginning 12/1/15. Fix aid for GFS Aid Year 2016.

### □ Terminate AST002

- Set pay line to Pending
- Enter Termination Date of 11/30/15
- Click on Detail to verify amounts – may need to click on *Copy to all terms* to adjust the term amounts as necessary

### □ Calc TAL for the old aid line

### □ Enter new Salary Payline with Start Date of 12/1/15

### □ Calc TAL and complete/approve all aid lines

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# GFS Payline Termination

For a straight postdoc terminations

Postdoc is terminating 11/30/15.

- ❑ Terminate AST002
  - Set pay line to Pending
  - Enter Termination Date of 11/30/15
- ❑ Calc TAL
- ❑ Complete and route for approval



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# Terminating a postdoc?

- Be sure to end BOTH:
    - The academic appointment
      - Termination form in PS Webforms
    - And the GFS pay lines
      - Completed and approved by department administrators before the payroll deadline
  - The submission of one will not end the other!!!
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# Terminating a postdoc?

- Contact RMG (SOM) or OSR (University) if the postdoc leaving has grant/fellowship support through Stanford
  - Necessary because:
    - the award needs to be terminated
    - any final reports (technical or financial) must be completed within the sponsor's deadlines
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# Late Entry & Retroactive Changes

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# Late GFS Entry (or Approval)

- Enter pay line using the originally intended GFS line information; complete and approve

## **Monthly Stipends**

- Enter in GFS and submit a HelpSU to Payroll to request a Will Call Check

## **Assistantship Salary**

- Enter in GFS and either submit a One Time Payment Form to Payroll to add the missing pay to the next regular paycheck OR complete a GFS Off-Cycle Check Webform to request a Will Call Check

Will call checks are generally available for pick-up after 3:00pm on the date requested for assistantship salary; after 3:00pm on Fridays for monthly stipends.

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# Requesting Repayment - If aid is decreased after the initial disbursement (Overpaid)

## ■ Monthly Stipends

- ❑ Enter in GFS and submit a HelpSU to Payroll for repayment amount
- ❑ Request check payment from the PostDoc

## ■ Assistantship Salary

- ❑ Enter in GFS and submit a HelpSU to Payroll for repayment amount
  - ❑ Request check payment from the PostDoc or submit a One Time Payment Form to Payroll to reduce the next regular paycheck(s)
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# Retroactive PTA Changes

- Monthly Stipends
    - Update GFS AND do an iJournal
  - Assistantship Salary
    - Change GFS AND do Oracle Labor Distribution adjustment
  - Fellowship Tuition or Tuition Allowance
    - For Aid Year 2016 and after: No action needed
    - For Aid Year 2015 and prior: No journals – Only update GFS
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# Cancel or Terminate

- Was the aid line correct for a period of time, or is it completely incorrect?
  - Correct for a period of time = Terminate
  - Completely incorrect = Cancel
- Was the aid amount entered correct?
  - Correct for a period of time = Terminate
  - Completely incorrect = Cancel

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# Cancel or Terminate

- Example of when to terminate
    - Aid line for 10/1-9/30 for \$2250 per pay period
    - Increase to \$2500 per pay period as of 1/1
  - Example of when to cancel
    - Aid line for 10/1-9/30 for \$2250 per pay period
    - Should be \$2500 per pay period starting on 10/1
  - In both cases, recalculate the TAL AND then Complete and Approve assistantship (salary)
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# Tips & Miscellaneous

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# Postdoc Pay Day

- Postdocs should sign up for direct deposit in Axess
    - Salary pay statements can be viewed in Axess
    - Stipend pay statements *cannot* be viewed in Axess
  - Check mail code in Aid Year activation each year to ensure correctness
    - First payment will usually be cut as a check as opposed to direct deposit
    - Stipend paid postdocs may be sent a pay statement to the mail code entered in Aid Year Activation
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# Maternity & Medical Leaves

(reference RPH 10.3)

- Postdocs who go on leave due to maternity will typically receive 60% of their salary/stipend directly from the postdoc Disability carrier (Standard and/or Liberty)
- Departments/Faculty sponsors are responsible for the remaining 40% of the total salary/stipend
  - Salary payments
    - e.g. New hours =  $(40 * .40) = 16$  **OR** New hours =  $(24 * .40) = 9.6 \sim 9$
    - New Assist Type = RAFC
  - Stipend simply reduced to 40% of original amount
- Contact Cecy Avila, DLS Leave Coordinator, **BEFORE** you have a postdoc go on leave ([6-hrleaves@stanford.edu](mailto:6-hrleaves@stanford.edu))

# GFS Workflow

- After Completing pay lines, they are routed for approval to the Home Department Approver and the Financial Approver (in Workflow Center)
- To Recall a pay line that you have completed (and which has not yet been fully approved):
  1. Go to Workflow Home in Axess
  2. Click on *My Pending Requests*



The screenshot displays the AXESS Workflow Home interface. At the top, there is a navigation bar with the AXESS logo and several menu items: MY AXESS, EMPLOYEE CENTER, STARS, OPA/BECHTEL CENTER, WORKFLOW HOME, ADMIN RESOURCES, CS Admin, STARS Admin, and Admin Favorites. Below the navigation bar, the page title is 'Workflow Home'. A summary bar contains three items: 'My Approvals' with a count of 3, 'My Pending Requests' with a count of 0, and 'My SuperUser List' with a count of 0.

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# GFS Workflow

- To Recall a pay line (con't)
    3. Select *GFS PAYMENT* from the Activity Filter drop-down
    4. Find line, scroll to right, and click on the **Recall** button
  - Pay line will show up in GFS as rejected, but you can then set it to Pending to make changes
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# GFS Roles

## GFS Roles

- ❑ *GFS Entry Person*: enters GFS aid lines
  - ❑ *Home Department Approver*: approves for postdoc's appointed "home" department
  - ❑ *GFS Financial Approver*: approves for the PTA entered
  - The Home Department and GFS Financial Approvers should not be the same person
  - **Note**: these roles are different from the the Postdoc Webforms Entry and Approver roles
    - Contact OPA for Webforms training
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# (Fairly) New Functionality

## ■ Buttons!

- “Select All” and “Complete All” buttons added to Aid Entry tabs
  - FLSHP Stipend, FLSHP Tuition, and Assist TAL

## ■ GFS Batch Aid Upload Tool

- Process developed to allow expert users to enter multiple GFS lines by uploading an excel spreadsheet rather than enter aid lines manually in GFS one by one
  - Job Aid can be found on the GFS Policy website here:  
<http://gfs.stanford.edu/gfsjobaids.html>
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# Minimum Funding Guidelines

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# Funding Minimums

## ■ For Research Scholars:

- Departments must review their postdoc's funding in order to confirm that support on October 1<sup>st</sup> is at least at, or above, the appropriate university minimum
- OPA will conduct periodic salary audits, and Department Managers will be notified of cases of non-compliance

## ■ For Clinical Scholars:

- Departments must pay any postdoc with incidental or full patient responsibilities (including those who may be working on-call at the hospitals) at the appropriate hospital PGY scale on September 1st.
    - Contact the GME Office for the current rate sheet
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# Funding Minimums

## Research Scholars

- New minimum effective 10/1/2015: \$50,000
  - Stanford Postdoc Salary Scales for both 2014-15 and 2015-16 can be found on the OPA website  
<http://postdocs.stanford.edu/handbook/salary.html>
  - Postdocs paid at or around the minimum will require adjustments to their pay on October 1<sup>st</sup> of each year in accordance with that years' new minimums
    - Funding level is based on their total postdoctoral research experience as of October 1<sup>st</sup>
  - Increases can be made ahead of October 1<sup>st</sup>; pay must still meet the required minimum on the following October 1<sup>st</sup> for months experience as of that October 1<sup>st</sup>
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# Minimum Funding Example

## **A new appointment with no postdoctoral research prior to Stanford appointment:**

- ❑ Appointment start date: June 1, 2015
    - 0 months experience → minimum \$44,310
  - ❑ On October 1, 2015 raise date:
    - 4 months experience → minimum \$50,000
    - Be sure to use the new 2015-16 rate sheet
  - ❑ Submit along with a PS Webforms Change form
  - ❑ Next required raise date: October 1, 2016
    - Postdoc will have 16 months experience
  
  - The PS Webforms system calculates required minimums on Recommendation and Change Forms
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# **GFS Resources & Help**

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# Email Distribution Lists

- Self subscribe to the following lists via **mailman.stanford.edu**:
    - ❑ gradfinsupport@lists.stanford.edu
    - ❑ gfsfinancialapprovers@lists.stanford.edu
    - ❑ studadmin@lists.stanford.edu
  
  - To be added to the Postdoc Administrator List
    - ❑ SOM: Contact Alistair Murray ([alistair@stanford.edu](mailto:alistair@stanford.edu))
    - ❑ University: Contact Tammy Wilson ([tjwilson@stanford.edu](mailto:tjwilson@stanford.edu))
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# OBIEE

- Reports for GFS can be found in BI ([bi.stanford.edu](http://bi.stanford.edu))
  - Getting access:
    - Access to reports is based on your PeopleSoft security access
    - If you have at least GFS Inquire role in PS, you have access to associated GFS reports in BI
  - Submitting HelpSU Tickets
    - Request Category = Administrative Applications
    - Request Type = Reporting - OBIEE
    - Include Report Title and Report Number in ticket
    - Include Mac or PC user
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# OBIEE Reports

## ■ **PS\_GFS030 Monthly Postdoc Stipend Report**

- ❑ Process this report by month end date (for the desired pay period) and emplid, plan, account, or dept/school. Displays amount issued, check number, account, etc. Only includes Active postdocs.
- ❑ [Folder: Graduate Financial Support]

## ■ **PS\_GFS013 Postdoc 50% Salary Report**

- ❑ Processes all postdocs at once. Displays postdocs who have employment of 50% or greater by month.
- ❑ [Folder: Graduate Financial Support]

## ■ **PS\_GFS020 Postdoc Paylevels Report**

- ❑ Process by plan or dept/school, student status, and aid year. Provides GFS aid information for postdocs, including INFO ONLY lines. All postdocs included regardless of aid status.
  - ❑ [Folder: Graduate Financial Support]
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# OBIEE Reports (con't)

- **PS\_GFS015 GFS Unapplied Aid Report**

- The GFS Unapplied Aid Report provides information about students who have received financial support in GFS in excess of charges. The unapplied aid needs to be revised or removed.
- [Folder: Graduate Financial Support]

- **PS\_SR123 Outstanding Postdoc Tuition**

- Process by Item Term. Identifies postdocs whose tuition has not been entered for a given quarter and all quarters prior. Lists all postdocs.
  - [Folder: Graduate Financial Support]
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# GFS & Payroll Help

- HelpSU to GFS Help Desk
    - Request Category = Administrative Applications
    - Request Type = PeopleSoft GFS
    - Include the Emplid, Name, and Aid Sequence
  
  - PeopleSoft Training Center: <http://learnps.stanford.edu/>
  
  - GFS Policy Website: <http://gfs.stanford.edu/>
  
  - HelpSU to Payroll
    - Request Category = Central Office Issues
    - Request Type = Payroll Question
    - Include the Emplid, Name, and Aid Sequence
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# GFS Help

- In-Person GFS Help - Friday Open Labs

Users who would like personalized help with their GFS questions, or who would like to go through the online training in a lab setting with a knowledgeable user on hand, are encouraged to attend a drop-in lab:

Days: Every Friday morning

Time: 9:00 - Noon

Where: Birch Modular, Lab B - 215 Panama

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# Questions

GFS Entry/Policy or Others?

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