RECOMMENDATION FORM JOB AID

In AXESS: Resources Tab > Postdoctoral Administrative Forms > Recommendation Form

1. **To create a new Recommendation Form, click "Add"**
    a. TRANSACTION DETAILS BOX
        i. Select Postdoc Data Form Field: Click the magnifying glass
            1. In the Look Up Box enter the postdoc surname in the Last Name Field, click "Look Up"
            2. From Search Results, click the name of the postdoc
            3. The Look Up Box closes and the Transaction Details Box is populated
        ii. Postdoctoral Request Type Field: Click on the drop down menu arrow and select "Clinical" or "Research," as appropriate
            1. Appointee Information, Department Applied, and Education Details Boxes are populated
        iii. Is this request for Department Transfer Field: Defaults to "No"
            1. If the postdoc is transferring to your department from another Stanford department, click the drop down arrow and select "yes"
    b. TRANSACTION DETAILS LINKS
        i. Comparative Display of Biographic Data Link – mouse over to compare the postdoc's biographic data from the Information Sheet and DS-2019
        ii. Offer Letter Link – after you have entered all appointment information, click "Save" at the bottom of the form to review the Offer Letter.
            1. Please review for grammatical errors where text you enter in the Recommendation Form populates the Offer Letter – dates of appointment, funding source(s), and any additional text.
        iii. Complete Information Sheet Link – review the postdoc's Information Sheet via this link
    c. ACADEMIC INFORMATION BOX
        i. Academic Career Field: Click the magnifying glass, click "Look Up," click the appropriate career (GR or MED)
        ii. Academic Program Field: Click the magnifying glass, click "Look Up," click on the appropriate Academic Program Description.
        iii. Academic Plan Field: Click on the magnifying glass, click "Look Up," click on the Academic Program Plan Description
        iv. Academic Sub-Plan Field: If the program has a sub-plan, repeat the same steps for the sub-plan
        v. Other Stanford Associations Field: If appropriate to your program, click on the magnifying glass, click "Look Up," click the appropriate association for the postdoc
            1. INDEPENDENT LABS, SLAC, ARTS, etc., PLEASE CHECK FOR YOUR INSTITUTE AND ENTER IN THIS FIELD
    d. APPOINTMENT INFORMATION BOX
        i. Area of Research/Training Position Description Field:
            1. Text entered here will complete the Offer Letter sentence that begins "During this appointment you will be involved in…"
            2. DO NOT ENTER A PERIOD at the end of your text; it is already in the offer letter text
        ii. Appointment Start Date Field: Enter the requested appointment start date
        iii. Appointment End Date Field: Enter the requested appointment end date
        iv. Offer Letter Date Field: Enter the date the offer letter will read
        v. Will the postdoc conduct research outside of Stanford campus Field: Defaults to "No."
            1. If changing to "yes" please enter the research location(s)

vi. Research Experience since last conferral date Field: Months are pre-populated based on employment information provided in the postdoc's Information Sheet
    1. KNOWN ISSUE – populated months may include pre-conferral employment data
    2. PLEASE DOUBLE CHECK the correct months of research experience and enter in the next field.

vii. Research Experience noted by department Field: Enter the correct number of months of research experience

viii. If postdoc is an MD will he/she have patient contact Field: Defaults to "No"
    1. If changing to "yes" complete the next field

ix. Additional Information regarding patient contact Field: Enter information if postdoc will have patient contact

x. Additional details regarding this appointment to be included in the offer letter Field:
    1. Entered text creates a new paragraph in the Offer Letter (page 2, third from last paragraph)

e. FUNDING DETAILS BOX
   i. If no funds are paid from a particular salary type, LEAVE THAT FIELD BLANK
      1. Entering "None" or "N/A" will populate in the funding sentence of the Offer Letter
   ii. Funding Description Fields: Enter a brief description in the appropriate field(s) – Salary, Stipend, Outside support
   iii. Amount Fields: Enter the funding amount(s), ensuring that the total (or combined total) meets or exceeds the Required Salary listed

f. VISA DETAILS BOX
   i. For international scholars, click the drop down arrow and select the appropriate visa type

g. SUPPORTING DOCUMENTS BOX
   i. Browse/Upload Field: Upload additional documents to include with the Recommendation Form
   ii. The Document Name list will show the documents that have been uploaded

h. Click "Save" to save the form and return later, OR click "Submit" to route the form for approval
   i. "Save" is required to view the Offer Letter via the link near the top of the document

2. To search for a previously saved or submitted Recommendation Form

a. From Postdoctoral Administrative Forms, click the "Recommendation Form" radio button

b. To search for all Recommendation Forms, click "Search"

c. To search for a specific Recommendation Form:
   i. In the search criteria fields, enter the postdoc's First and Last Names, and click "Search"
   ii. From Search Results, click the Transaction ID of the Recommendation Form

After the Recommendation Form is submitted:

- The Recommendation Form routes to the Role 2 approver (if your department has one), or to the Role 3 Chair/Proxy/DFA department manager for approval.
- After Role 3 approves the form, the postdoc receives an email notification with instructions to return to the secure portal to view and accept the offer letter.
- The Administrator receives an email notification to return to workflow to verify the Recommendation Form; however, the Approve button on the form is not enabled until *after* the postdoc accepts the offer letter.
- After the Administrator verifies the Recommendation Form, the form routes to OPA for review and approval.