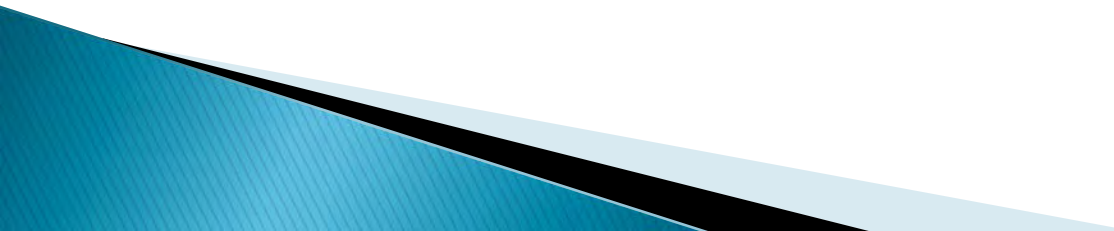


# Refresher Training: PD Web Forms and Tips & Tricks

Tammy Wilson & Al Murray  
Alway M114: May 21, 2015

# Agenda

- ▶ Confidential Information
  - ▶ Reviewing Information in PD Web Forms
  - ▶ Tips for Inviting Postdoc and Approving Data
  - ▶ Tips for Recommendation Form
  - ▶ Searching for Records in PD Web Forms
  - ▶ Paying Postdocs
  - ▶ Oct. 1<sup>st</sup> Salary Change Requirements
  - ▶ LOA Forms
  - ▶ Departmental Transfers
  - ▶ Termination Codes
  - ▶ Postdoc Benefits
  - ▶ Job Aids for PD Web Forms
- 

# Confidential Information

# Confidentiality of PD Web Forms

- ▶ Information entered in PD Web Forms is part of Student Records.
  - Postdoc can request to view student records.
- ▶ System sends notification to Postdoc of any change being made to the system at the request for the change and the approval of the change.
- ▶ Confidential funding, performance reviews or other sensitive information should *not* be entered into PD Web Forms.

# Confidentiality of PD Web Forms

- ▶ IDP forms that are required for 5<sup>th</sup> & 6<sup>th</sup> year extensions should be submitted to OPA manager along with PI Justification, updated CV, Research Experience calculator and Notice of Award or accepted offer letter (if applicable).
- ▶ Initial IDP and Annual IDP forms contain sensitive data and should not be uploaded to PD Web Forms.

# Inviting Postdocs



# Tips for Inviting Postdoc

- ▶ Navigation to Invite page (see next slide) is within PeopleSoft, not Postdoc Administrative Forms (Acess). Use non-Stanford email address to invite.
- ▶ DO NOT send a 2<sup>nd</sup> invitation to the same email address. PD Web Forms will remember only the 1<sup>st</sup> invite and Postdoc will not be able to accept Offer Letter in SecurePortal.
- ▶ If faculty sponsor cannot be found to add to invite, you must email [reg-courses@stanford.edu](mailto:reg-courses@stanford.edu) to request addition to the instructor/advisor table. Faculty sponsor must be a member of the professoriate. You cannot proceed until confirmation is received from Registrar's Office and faculty has been added to table.

# New Department: Navigation to STF PostDoc Invite

The image shows a screenshot of a navigation menu with a light beige background. The menu is organized into two columns. The left column contains items such as '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', 'STF Grad Financial Support', 'Set Up SACR', 'PeopleSoft', 'Worklist', 'Reporting Tools', 'PeopleTools', and 'My Personalizations'. The right column contains items such as 'Personal Information', 'Personal Information (Stud...', 'SEVIS', 'Checklists', 'Communications', 'Comments', 'Service Indicators', 'Service Indicators (Student)', 'Organization', 'Committees', 'STF PostDoc', and 'Student Services Ctr (Stud...'. A third column of items is visible on the right side of the menu, including 'Post Doc Transactions', 'Administrative Forms', 'STF PDOC Type of Position ...', 'STF Pdoc OtherAffiliations', 'STF PosDoc Minimum Salar...', 'STF PostDoc Invite', and 'Stf PostDoc Transaction st'. The 'STF PostDoc Invite' item is highlighted in red text. The 'Campus Community' and 'STF PostDoc' items are also highlighted with a white background and a red arrow pointing to the right.

STF Web Forms	>	
Self Service	>	
STARS Menu	>	
Campus Community	>	Personal Information >
Student Recruiting	>	Personal Information (Stud... >
Student Admissions	>	SEVIS >
Records and Enrollment	>	Checklists >
Curriculum Management	>	Communications >
Student Financials	>	Comments >
Academic Advisement	>	Service Indicators >
Contributor Relations	>	Service Indicators (Student) >
Stanford Utilities	>	Organization >
STF Grad Financial Support	>	Committees >
Set Up SACR	>	STF PostDoc >
PeopleSoft	>	Student Services Ctr (Stud... >
Worklist	>	
Reporting Tools	>	
PeopleTools	>	
My Personalizations	>	



# Add a New Value, complete Stf Postdoc Invite page:

1. Modify email text for clarification (e.g. Department/Division);
2. DO NOT remove language, only add;
3. Send to generate invitation and email notification to postdoc.

## STF PostDoc Invite

Applicant's Email: twentyquestions@hotmail.com

First Name:

Last Name:

### Department to which Postdoc Candidate is applying

\*DeptID:

\*Faculty Sponsor ID:

Research Mentor ID:

Admin Contact:

09952755

Alistair Murray

Phone:

Phone:

Phone:

Email Addr:

Email Addr:

Email Addr:

650/498-7618

alistair@stanford.edu

Email to Applicant:

Email Sent: No

Email Sent On:

Dear ,

Alistair Murray in at Stanford University has initiated the process of your postdoctoral appointment at Stanford. Please go to <http://secureportal.stanford.edu>, register as a new user on the site, and complete the "New Postdoctoral Scholar Data Form."

Once registered and logged-in to [SecurePortal.stanford.edu](http://SecurePortal.stanford.edu), please click on "New Postdoctoral Scholar Data Form" to begin completing your information. In the form you will provide your demographic information, academic history, and upload the required documents listed below. If you have any questions about this form, please check [http://postdocs.stanford.edu/incoming\\_scholars/prior\\_to\\_arrival.html](http://postdocs.stanford.edu/incoming_scholars/prior_to_arrival.html).

Required Documents (in .pdf format):

1. Your doctoral diploma. If you do not have a diploma, an official letter from your university showing your completion of your doctoral degree requirements is necessary.
2. Your current CV.
3. If you are not a US citizen, include:

# When completing the Data Form in SecurePortal, the postdoc will be reminded to use his non-Stanford email account

UNIVERSITY

## Postdoctoral Scholar Data Form

### Information

Hello, you are logged in as AAARRR

Click on underlined field names to see additional information about those fields.

Fields marked with an "\*" are REQUIRED.

### Current Section

Personal Details

**Personal Addresses**

Ethnicity

Dependents

Ext. Funding Details

Education Details

Work Experience

Documents

Finish

### Personal Addresses

Home

Save

< Previous

Next >

\*Email address ie @yahoo.com MUST match email address used to register with Stanford department.

### Current Mailing Address

\*Address Line 1 PO Box 8888

Address Line 2

\*City

Stanford

\*Country United States

Zip

94305

\*State Select State

Phone (650) 555-1212

Valid Through Date 08-31-2012

Permanent address same as above

Yes  No

Please use your permanent home address from your home country

### Permanent/Home Mailing Address

\*Address Line 1 PO Box 8888

Address Line 2

\*City

Stanford

\*Country United States

Zip

94305

\*State Select State

Phone (650) 555-1212

Valid Through Date 08-31-2012

# Tips for Approving Data Form in PD Web Forms


# Data Form Information Review

- ▶ Data Form is submitted by Postdoc in SecurePortal web site
- IMPORTANT: Once “approved” by role #1 admin, the data form is locked and *cannot* be edited by anyone.
- If *any* information is incorrect, you must “RETURN” to the postdoc for correction (via Workflow).
- 
- Do not DECLINE as this removes transaction from system and will require a new invitation with different non-Stanford email address.
- Use documents uploaded to the Data Form by invited postdoc to check eligibility and research experience.

# Data Form Information Review

- ▶ If Postdoc has trouble uploading documents, ask them to be emailed to you. You can verify appointment eligibility and add them to the Recommendation Form.
- ▶ TIF, PNG and DOCX are not supported formats.
- ▶ This is the reason for the postdoc stating “the documents were there but now they are gone”. One bad document causes all to disappear.
- ▶ Submit HelpSU ticket to OPA after submission of form. Note transaction ID on ticket. OPA can remove bad document(s) so that all others can be seen, but ONLY after submission of Data Form.

# Reviewing International Postdocs

- ▶ International Postdocs – data MUST MATCH PASSPORT’s machine-readable text
  - ▶ Dual Citizenship – must use the citizenship on the passport they will be using to enter the US
  - ▶ Birthdate – must be USA format (mm/dd/yyyy)
  - ▶ Funding – in US\$
  - ▶ Bechtel only approves Research Scholars – Clinical Scholar visas are approved by ECFMG & GME
- 

# Reviewing US Postdocs

- ▶ US Postdocs – Biographical Details entered on Data Form must match I-9 documentation, e.g., social security card, etc.
- ▶ Documentation will be required by Payroll prior to payroll processing.
- ▶ Review Gateway to Financial Activities:
- ▶ [http://web.stanford.edu/group/fms/fingate/staff/payadmin/payadmin\\_student.html](http://web.stanford.edu/group/fms/fingate/staff/payadmin/payadmin_student.html)

# Tips for Recommendation Form in PD Web Forms

Do not submit for approval unless requirements for approval by OPA have been met



# Upload Documents on Recommendation Form

- ▶ Required documents not uploaded by Postdoc, e.g., degree conferral, can be uploaded by you to Recommendation Form

▶

▼ Funding Details


Please enter the funding amount and a description of funding sources supporting this postdoctoral appointee. The text you enter in the description will be added to the Offer Letter. To verify the minimum funding required and other Stanford policies regarding funding, check: [http://postdocs.stanford.edu/admin/how-to/paying\\_postdocs.html](http://postdocs.stanford.edu/admin/how-to/paying_postdocs.html).

<b>New Salary Paid through Stanford University, entered in GFS - Description</b>	<input type="text"/>	<b>Annual Amount:</b>	<input type="text"/>	
<b>New Stipend / Fellowship support paid through Stanford University - Description</b>	<input type="text"/>	<b>Annual Amount:</b>	<input type="text"/>	
<b>New Outside support with direct payment to fellow - Description</b>	<input type="text"/>	<b>Annual Amount:</b>	<input type="text"/>	
	NIH		53000.00	
<b>Required Salary:</b>		0.00	<b>Total Annual Amount:</b>	53000.00

▼ Department Administrator

<b>Admin:</b>	05281677	<b>Appelies Ransome</b>	
<b>Phone:</b>	650/736-0129	<b>Email Addr:</b>	pscs-dev-emails@stanford.edu

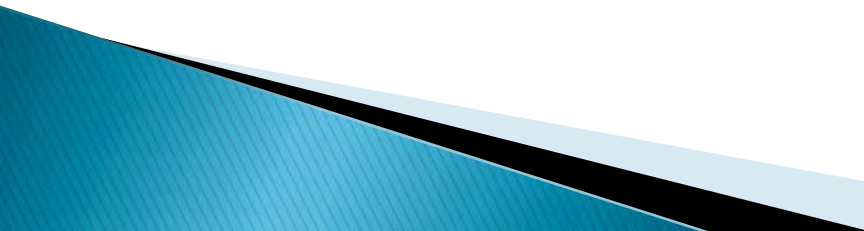
Supporting Documents



# How to Upload Documents after submission of Recommendation Form

- ▶ If you need to upload documents after the Recommendation Form has been submitted, you must navigate to the form in PeopleSoft:
  - ▶ Campus Community
  - ▶ Stf Postdoc
  - ▶ Post Doc Transactions
  - ▶ Stf Postdoc Recommendation
- ▶ Upload in Workflow is no longer an option

# Academic Information section

- ▶ Non-degree granting Programs, e.g. Freeman Spogli Institute, Dean of Research, Woods Institute, BioDesign, all use the “Other Associations” field and the Academic Program of the faculty sponsor.
  - ▶ Only School of Medicine divisions use Academic Sub-Plan field.
  - ▶ INCOMPLETE Academic Information will result in return of Recommendation Form.
- 

# Years of Research

- ▶ Admin must carefully review research experience months with the CV to determine if any postdoctoral research time should be excluded after doctoral degree conferral.
- ▶ Enter months in Research Experience, noted by Department field on Recommendation Form (see next slide). Review [University Policy](#) to determine if time should be discounted.
- ▶ Use the Research Experience Calculator spreadsheet to assist:
- ▶ [http://postdocs.stanford.edu/admin/how-to/prior\\_experience.html](http://postdocs.stanford.edu/admin/how-to/prior_experience.html)
- ▶ If you are still unsure of your calculations, please submit HelpSU ticket; category: Central Office Issues, Postdoctoral Affairs, with CV attached.

## IMPORTANT REMINDERS:

Once Rec Form is approved by OPA, this field cannot be changed. It must be correct or form will be returned for correction, approval and a 2<sup>nd</sup> acceptance of offer letter by the postdoc.

- ▶ Minimum salary level is determined by number of months admin enters on the recommendation form.
- ▶ Prior research experience impacts the length of time a postdoc can stay at Stanford and minimum salary level.

# Years of Research

## Appointment Information

### \*Area of Research/Training - Position description:

basic research in cardiovascular development and disease

\*Appointment Start Date: 02/24/2015

\*Offer Letter date: 01/29/2015

\*Appointment End Date: 02/23/2016

Will the postdoctoral scholar conduct research outside of Stanford University campus?

Yes  No

If yes, list location(s):

Will the postdoc work in a laboratory?

Yes  No

Is this a biosciences lab?

Yes  No

Is this a joint appointment Instructor/Clinical Instructor?

Yes  No

Research Experience since last conferral date: 12 Months

Research Experience, noted by department: 36 Months

If the post doctoral scholar has an MD, will he or she have patient contact?

Yes  No

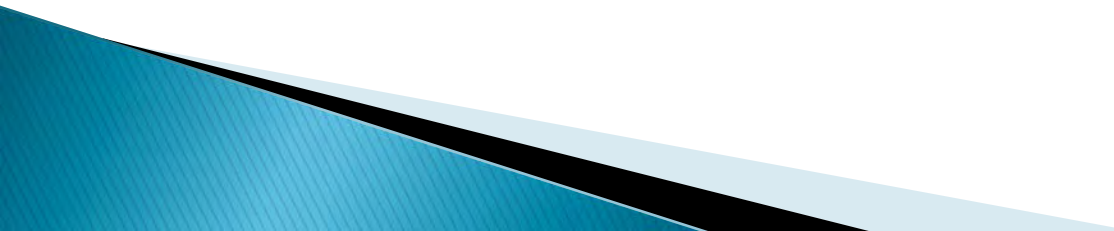
# Outside Funding Letters

- ▶ Must provide a start and end date.
- ▶ Must state a specific funding amount (salary range not acceptable).
- ▶ Must be in US \$, use [www.oanda.com](http://www.oanda.com) for conversion rates.

# Outside Funding Letters

- Postdocs on External, Direct-Pay Funding
- Award Letter should be uploaded by Postdoc to Data Form
  - Upload copies of award letters to Rec Form if extending appointment and email confirmation of upload to OPA postdoc manager.
  - External funding entered in GFS as “Info Only” stipend lines.
  - Other currencies must be converted to US dollars.
    - [www.oanda.com](http://www.oanda.com) is a good resource for currency exchange rates.
    - **REMINDER:** Double-check that currency exchange rates have not caused a postdoc to fall below funding minimums.
  - External funding must be supplemented by department funds if below the required minimum.

# Offer Letter in Recommendation Form

- ▶ “Area of Research Training and Research Description” feeds to the middle of a sentence – please be sure to double check this language and punctuation prior to submission.
  - ▶ If “additional details” are added to the offer letter, please open and review the offer letter for grammatical error and consistency of text.
- 



# Checking Offer Letter

▼ Academic Information

\*Academic Career:  Graduate      \*Academic Program:  Chemistry

\*Academic Plan:  Chemistry (PD)      Academic Sub-Plan:

Other Stanford [Associations](#):

▼ Appointment Information

\*Area of Research/Training - Position description:

\*Appointment Start Date:

\*Appointment End Date:

Will the postdoctoral scholar conduct research outside of Stanford University campus?  Yes  No

If yes, list location(s):

Research Experience since last conferral date:  Months

Research Experience, noted by department:  Months

If the post doctoral scholar has an MD, Will he or she have patient contact?  Yes  No

Additional Information regarding Patient Contact:

Additional details regarding this appointment to be included in the offer letter

characters left

▼ Funding Details

# Where to add more information in the offer letter...

Additional details regarding this appointment to be included in the offer letter

In your position you will also be ....



# Form Saved

- ▶ Prior to viewing, Rec Form must be saved

Please enter the funding amount and a description of funding sources supporting this postdoctoral appointee. The text you enter in the description will be added to the Offer Letter. To verify the minimum funding required and other Stanford policies regarding funding, check: [http://postdocs.stanford.edu/admin/how-to/paying\\_postdocs.html](http://postdocs.stanford.edu/admin/how-to/paying_postdocs.html).

New Salary Paid through Stanford University, entered in GFS - Description

Annual Amount:

New Stipend / Fellowship support paid through Stanford University - Description

New Outside support with direct payment to fellow - Description

NIH

Required Salary

Department Administrator

Admin: 05281677 Annelies Ransome  
Phone: 650/736-0129 Email Addr: pscs-dev-emails@stanford.edu

Supporting Documents


Browse... Upload

Save Submit Back Print

**Message**

Post Doc Form Saved Successfully (25400,15)

OK



# Then you can Click on Offer Letter, verify completeness and formatting before you submit the Form.


- ▶ Scroll to top or bottom of form and open draft offer letter. Note: Editable text will be highlighted in yellow.

## Recommendation Form to appoint Postdoctoral Research Scholars/Clinical Fellows (Trainees)

The following information is required for processing the Postdoctoral Scholar appointment, benefits enrollment, visa petition requests, SEVIS database management, & other appointment processes.

\* Required field + Must match passport

Transaction Details

Select PostDoc Data Form:  

\*Postdoctoral Request Type:

Is this request for Department Transfer:

[Comparative Display of Biographic Data](#)

Appointee Information

Last Name:	Rannie	First Name:	Annie	Middle Name:	
Date of Birth:	12/25/1955				

Department Applied



# Draft Offer Letter: Review Mode

August 2, 2011

FROM: Jeffrey Koseff, Department of Chemistry  
Stanford University  
Stanford, CA 94305

TO: Annie Rannie  
PO Box 8888  
Stanford, CA, USA 94305

Dear Dr. Rannie:

I am pleased to offer you an appointment as a Postdoctoral Scholar in the Department of Chemistry. This letter is intended to document our understanding of your appointment as a member of the Stanford academic community, you will be subject to the applicable policies and procedures of the University; many of the policies and procedures that relate specifically to Postdoctoral Scholars are set forth in Research Policy Handbook (RPH) 9.4 and in the Stanford Postdoctoral Scholar Handbook (<http://postdocs.stanford.edu/handbook/>).

During this appointment, you will be involved in the exciting world of chemical reactions. Your initial appointment will begin on August 2, 2011 and end on August 31, 2012. Your total support for the initial year of training will be \$53,000, plus certain medical, dental, vision and life insurance coverage through Stanford's Postdoctoral Scholar programs. Your appointment may be terminated prior to the anticipated end date noted above based upon loss of funding, change in programmatic need or unsatisfactory performance on your part. Effective on October 1 of each year of your appointment your funding support may change in order to meet the university's stipend/salary levels of support for postdoctoral scholars in a given academic year. At the end of the initial appointment and subject to the term limits set forth in RPH 9.4 and the Postdoc Handbook, your appointment may be eligible for renewal, based on satisfactory performance, the existence of funding, and programmatic need.

The source of your funding will be from NIH. At this time or during the term of your appointment, if you will receive other funding to support your postdoctoral training at Stanford, you are required to provide a

# Draft Offer Letter: Review Mode

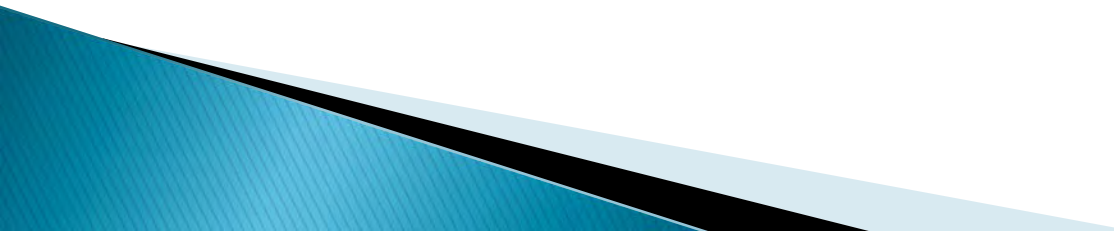
degree has not yet been conferred, a statement of completion of studies from your home institution (Registrar's Office or equivalent) is required before your appointment may start. This statement should indicate the date on which all requirements were completed and the expected date of degree conferral. Send this statement (with a certified English translation) to the Office of Postdoctoral Affairs.

In your position you will also be expected to

For your records, please print a copy of this letter and the Terms and Conditions of Postdoctoral Appointments at Stanford at [http://postdocs.stanford.edu/admin/pdfforms/Terms\\_and\\_Conditions\\_of\\_Postdoctoral\\_Offers.pdf](http://postdocs.stanford.edu/admin/pdfforms/Terms_and_Conditions_of_Postdoctoral_Offers.pdf). By clicking "Accept" below, you will be sending your acceptance of this offer and its terms electronically to Stanford. As is the case for all postdoctoral scholar appointments at Stanford, this offer is contingent upon approval by the Office of Postdoctoral Affairs. You will be notified by email once this process is completed.

I look forward to you joining the Department of Chemistry . Should you have any questions regarding your appointment, please contact Annelies Ransome by e-mail at [psc-dev-emails@stanford.edu](mailto:psc-dev-emails@stanford.edu). Please visit the Office of Postdoctoral Affairs website at <http://postdocs.stanford.edu> (click on the "Incoming

# Submission of Appointments for Approval: Required documents

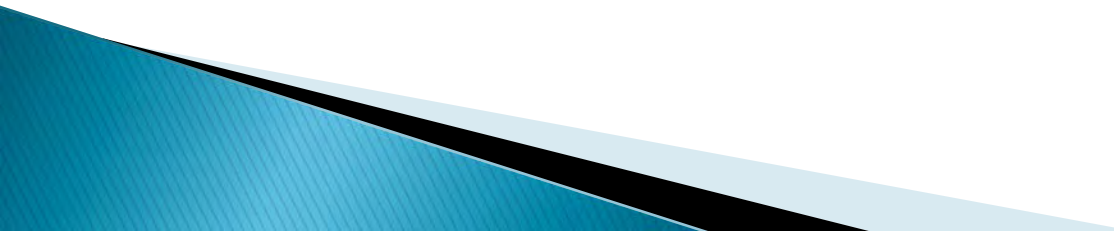
- ▶ Prior to approval within your Department and then by OPA, ensure appointment has all required documents for approval.
  - ▶ If PhD completion has not yet occurred, e.g., thesis review is in process, appoint as VSR instead.
- 

# Clinical Trainees

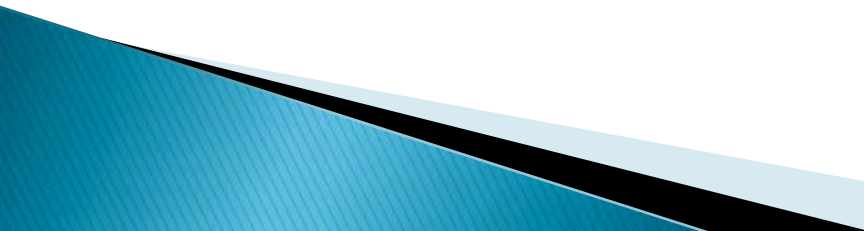
- ▶ Recommendation Form must contain:
  - ▶ MD diploma
  - ▶ CA Medical License (see next slide for exception)
  - ▶ Patient Care Contact Form
  - ▶ CV
  - ▶ Billing Agreement (if applicable, usually Clinical Instructor appointments)
  - ▶ Passport (if on J1, DS-2019 approval by ECFMG and GME. Upload copy of approved DS-2019 when received.)



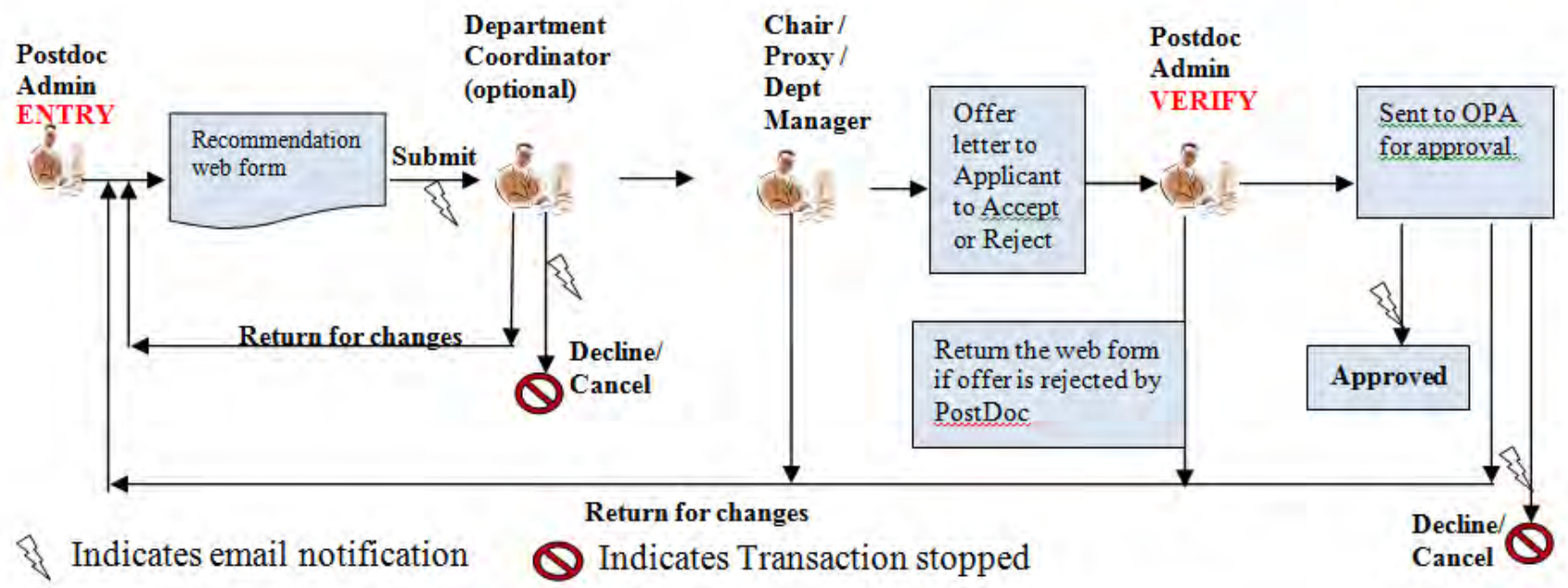
# Clinical Trainees

- ▶ Canadian citizens cannot apply for CA Medical License until resident in CA with a SSN.
  - ▶ Residents and Clinical Fellows who apply for and are awarded research grants, sponsored projects and fellowships through RMG must have academic appointments with Stanford University. These trainees must be transferred from SH&C to OPA and appointed as clinical trainees.
- 

# Postdoctoral Scholars

- ▶ Recommendation Form must contain:
  - ▶ Doctoral diploma or University letter of completion (no department letters)
  - ▶ CV
  - ▶ Outside Funding Award(s) (if applicable)
  - ▶ Passport (if international)
  - ▶ EAD Card (if in F1–OPT status)
  - ▶ Green Card (if Permanent Resident)
- 

# Recommendation Form Workflow



# Recommendation Form Workflow

- ▶ Postdoc admin has two roles in this process:
  - Admin **Entry** – creates web form and submits to DFA/Department Manager.
  - Admin **Verify** – reviews web form for errors or changes and submits to OPA for approval.
    - **A GREYED OUT APPROVAL BUTTON** indicates that the postdoc has not accepted the offer letter.
    - IF sufficient proof of degree is not yet available, **DO NOT VERIFY/APPROVE** – rather, **HOLD** the recommendation form in admin workflow until proof of degree is received and uploaded.

# Searching For Records in PD Web Forms

# To Retrieve A Record after Viewing Offer Letter

## Postdoctoral Forms

### Request Type

Recommendation Form

Termination Form

Change Transactions

Web Form Transaction ID

Postdoctoral Request Type

First Name

Last Name

Academic Program

Academic Plan

Academic Sub-Plan

Transaction Status

Search

Clear All



# Retrieve All Records or find Student ID

**STANFORD UNIVERSITY** | AXESS

Unsupported Browser: Firefox 6 on Windows! Hover mouse over this text for more information.

PeopleSoft Employee Information STARS (Training) [Add to Favorites](#)

Menu








Search:


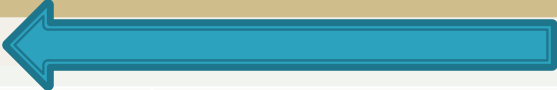
- My Favorites
- STF Web Forms
- Courses & Grades Menu
- Manager Self Service
- STARS Menu
- Training and References
- Time and Labor
- Campus Community**
- Personal Information
- Personal Information (Student)
- SEVIS
- Checklists
- Communications
- Comments
- Service Indicators
- Service Indicators (Student)
- Organization
- STF PostDoc
- [Student Services Ctr](#)

[Main Menu](#) > [Campus Community](#) > [STF PostDoc](#) >

## Post Doc Transactions

Post Doc Transactions

 <b>STF PostDoc Change Requests</b> STF PostDoc Change Requests Appointment dates, Funding and Faculty Change	 <b>STF PostDoc ClearBenefit Inter</b> STF PostDoc ClearBenefit Interface	 <b>STF PostDoc LOA Request</b> STF PostDoc LOA Request
 <b>STF PostDoc Transaction Transactions</b> STF PostDoc Transaction Transactions	 <b>STF PostDoc Recommendation</b> STF PostDoc Recommendation Form	 <b>STF PostDoc Termination</b> STF PostDoc Termination
 <b>Stf PostDoc Approval</b> Stf PostDoc Approval or Provisional flags for PostDocs		



# To find Student ID in PD Web Forms


- ▶ In Postdoc Administrative Forms – choose Change Request, then Add a New Value:
- ▶ Click magnifying glass next to Student ID:

**Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes**

Request Type

Appointment dates change       Faculty change       Funding change

▼ Bio Demo

\*Student ID:  

\*Acad Orr:  



# Enter Student Name and LookUp:


Stf Pdoc Change Rqst   Stf Wf Transaction   Stf Wf Txn Approvr


## Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

Appointment dates change    Faculty change    Funding change

Biò Demo

\*Student ID:  

\*Acad Org:  

Academic Program:

Academic Plan:

Academic Sub-Plan:

Appointment type:

Original Appointment Start date:

Post Graduate Year (PGY):

Months of Applicable Experience Prior to this Appointment:


Months of Current Appointment:

Visa/Permit Type:

Faculty Sponsor:

Faculty Mentor:

Additional Information regarding terms:

Look Up \*Student ID 

Empl ID: begins with

Last Name: begins with

First Name: begins with

Academic Program: begins with

Academic Plan: begins with

Academic Subplan: begins with

Look Up   Clear   Cancel   [Basic Lookup](#)

# Paying Postdocs

# Paying Postdocs

- ▶ Postdocs are paid through GFS. All postdoctoral scholars and clinical trainees appointed through OPA are billed the \$125 tuition/registration charge each term. Bills are mailed out by Student Financial Services once a month, if the payment has not already been entered in GFS by their department AND disbursed to their Student Account in Axess.
- ▶ Mail Code in GFS Aid-Year Activation is where the pay stub is sent for stipend-paid postdocs and where the pay check is sent (if direct deposit is not yet set up).
- ▶ Salary-paid postdocs can view their pay stub in Axess after first pay day.
- ▶ Postdocs MUST check Axess to ensure they have a mailing address listed. If no mailing address is listed and online delivery has not been requested, the W2 issued by Payroll will be sent to the home address. International Scholars will have their foreign address listed as home address; a SEVIS requirement for international scholars.
- ▶ Postdocs cannot change where the pay stub or check is sent by changing their mailing address in Axess. A live pay check is sent to the Mail Code listed on GFS Aid-Year Activation screen. They must contact their GFS Administrator to change the mail code in GFS.
- ▶ Postdocs should sign-up for direct deposit as soon as possible after 1<sup>st</sup> pay check is issued.
- ▶ Review Gateway to Financial Activities:  
▶ [http://web.stanford.edu/group/fms/fingate/staff/payadmin/payadmin\\_student.html](http://web.stanford.edu/group/fms/fingate/staff/payadmin/payadmin_student.html)

# Caltrain Go Pass

- ▶ The Pilot Go Pass program is offered to postdoctoral scholars residing off Stanford property and within typical daily commuting distances. For more information about eligibility, refer to the [pilot program eligibility](#) page on the Parking & Transportation Services web site.
- ▶ Passes cannot be purchased unless you have an eligible residential address in Axess identified as “Stanford (local) address” or “SEVIS (US)”.
- ▶ REMINDER: Postdoctoral Scholars must also enter a mailing address in Axess. Payroll will send W2 to this address if online delivery has not been requested. Contact Payroll for information regarding tax forms.

# October 1<sup>st</sup> Minimum Salary Increase

Review your Postdocs to ensure they meet  
Minimum Funding Requirements

# October 1<sup>st</sup> Minimum Salary Increase

- ▶ **All postdocs must be paid at the appropriate pay level based on years and months of research experience. Reviewed by OPA every year effective October 1st.**
  - Scholars must be funded at least at the minimum level based on their cumulative years and months of research experience on October 1. Submit Funding Change, Change Request in PD Web Forms to increase funding.
  - NOTE: The Funding Change web form does not generate a GFS pay line to increase the postdoc compensation.
  - Funding Guidelines and links
  - <http://postdocs.stanford.edu/handbook/salary.html>
    - Salary Calculator built in to PD Web Forms.

# October 1<sup>st</sup> Minimum Salary Increase

- Postdocs on External, Direct-Pay Funding
  - Upload copy of award letters to Recommendation Form and notify OPA by comment on Change Request.
  - External funding must be entered in GFS as “Info Only” stipend line(s).
  - Foreign currencies must be converted to US dollars:
    - [www.oanda.com](http://www.oanda.com) is a good resource for currency exchange rates.
    - **REMINDER:** Double-check that currency exchange rates have not caused a postdoc to fall below funding minimums. Do this at least two times every year.
  - External funding must be supplemented by department funds if it does not meet the required minimum.

# October 1<sup>st</sup> Minimum Salary Increase

- ▶ Postdocs on an unpaid Leave of Absence
  - End stipend or salary lines in GFS.
  - Enter the appropriate salary/stipend rate when postdoc returns from leave.
  - If postdoc is on leave for the entire term and no salary/stipend is entered to generate the \$125, the fee still has to be paid. Postdocs retain their “active” status in PeopleSoft (no L or P employee status).
  - A “FLSHP Tuition” line for the quarter must be entered to avoid the postdoc receiving a bill.



# October 1<sup>st</sup> Salary Changes

- ▶ These are done via the Change Transaction form in STF PostDocs.

## Postdoctoral Forms

Request Type


Recommendation Form     Termination Form     Change Transactions


Web Form Transaction ID


EmplID

First Name

Last Name

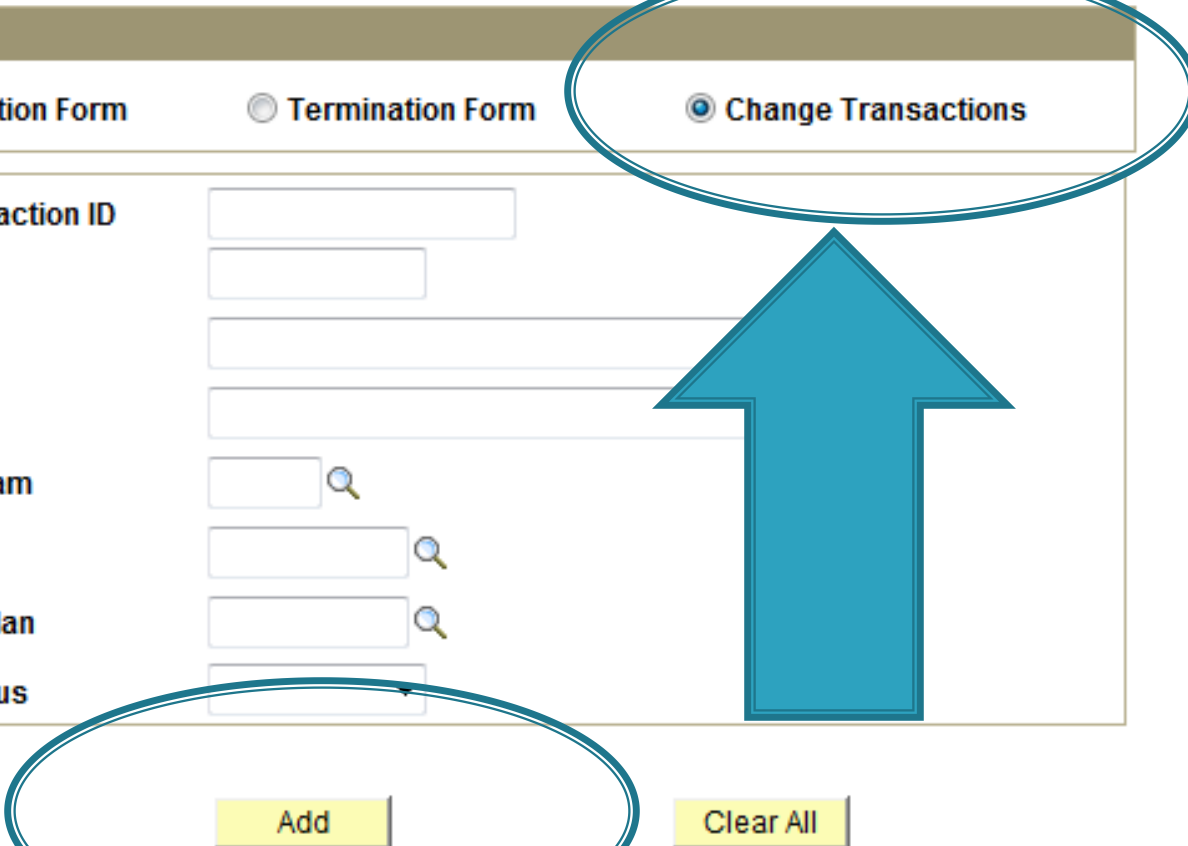
Academic Program  

Academic Plan  

Academic Sub-Plan  

Transaction Status



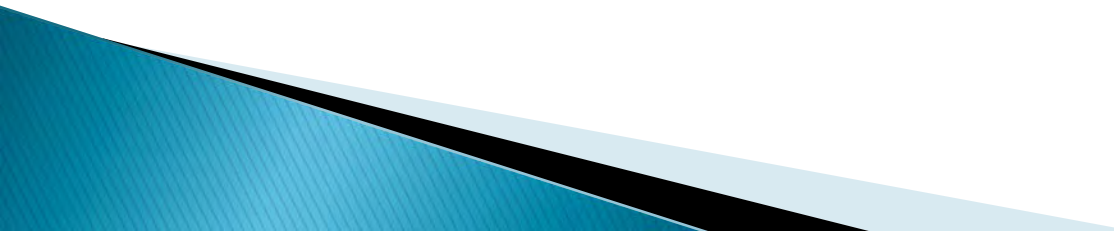
# October 1<sup>st</sup> Salary Change

- ▶ Postdoc Web Form system automatically generates an email notification to the Postdoc and PI when requested change is submitted. Another notification is sent when change is approved.
- ▶ Reappointment/Salary Change letter notifications issued by Departments follow local procedures. OPA does not issue these letters.
  - These do not need to be submitted to OPA as email notifications are the OPA approvals.

# Leave of Absence (LOA)

Unpaid

# LOA Web Form Initiated by Postdoc in AXESS

- ▶ Information can be found at <http://postdocs.stanford.edu/admin/how-to/leave.html>
  - ▶ Maximum of 3 months unpaid leave with approval of PI and in accordance with Postdoc Benefits and Visa policies.
  - ▶ Routes to Department for approval prior to routing to OPA.
- 

# Benefits During LOA Period

- ▶ Postdocs are required to maintain their benefits while on an approved, unpaid LOA. Although customary, faculty mentors are not required to pay for the Stanford health insurance coverage for the Postdoc while on an approved, unpaid LOA. In this instance, a Postdoc must be willing to pay the total cost of their benefits that includes the institutional and Postdoc portion while on an unpaid leave. The Postdoc will be required to enter their banking information in ClearBenefits so that the total premium can be collected through a direct debit to their bank account.
- ▶ If faculty sponsors/PIs agree to pay the full cost of the University contribution to the postdoc's benefits, they typically use unrestricted funds and must provide a PTA to which the premiums can be charged.
- ▶ Faculty sponsors/PIs are required to pay for life/accidental death and disability coverage for their postdocs while on an unpaid LOA.

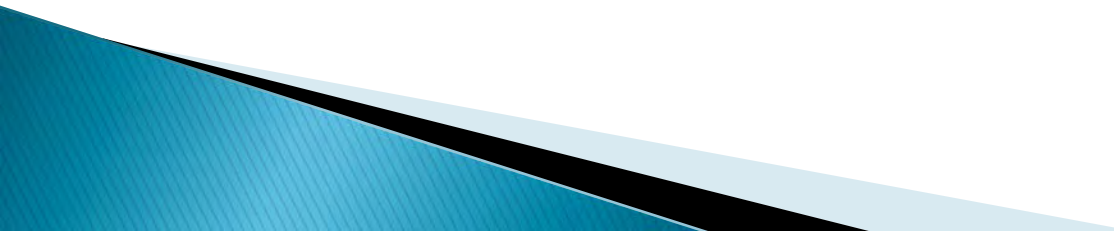
# J-1 Visa Postdocs and LOA

- ▶ International postdoc requests are reviewed in light of visa regulations and may not be approved if the leave violates visa requirements.
  - International postdocs in J-1 visa status **MUST** leave the U.S. in order to qualify for an unpaid LOA.
  -
- ▶ International postdocs who request an unpaid leave should do so **BEFORE** the start of the leave's occurrence, and immediately upon learning of the need to take a leave. The University (Bechtel International Center) is required to report infractions in the scholar's SEVIS record.

# Departmental Transfers

*Helpful Tips*

# What is a “Departmental Transfer”?

- ▶ A current Stanford postdoc ending their appointment in one Stanford department/division being hired as a postdoc in another Stanford department/division.
  - ▶ **IMPORTANT:** Transfer must be coordinated with the other department to comply with visa policies and ensure continuation of pay and ID Card privileges.
- 



# Departmental Transfer Steps

- 1) Current department/division must go into PD Web Forms and choose “Termination Form” and select “Departmental Transfer” as the reason for termination.
  
- 2) New department/division must hire the postdoc via STF Postdoc Invite and complete the Information Sheet & Recommendation Form process.
  - **IMPORTANT:** Postdoc *cannot* use their existing Stanford Email Address (@stanford.edu) anywhere in the Transfer Appointment process or the non-Stanford email used in the previous appointment.

# Postdoctoral Forms

Request Type


Recommendation Form       Termination Form       Change Transactions


Web Form Transaction ID


EmpID

First Name

Last Name

Academic Program  

Academic Plan  

Academic Sub-Plan  

Transaction Status  ▼

Search

Add

Clear All

# POSTDOCTORAL SCHOLAR TERMINATION FORM

\* Required field + Must match passport

## ▼ Bio Demo

\*Student ID:   Annie Rannie

\*Acad Org:   Chemistry

Student Email: @yahoo.com

Phone:

Acad Program: CHEM Chemistry

Academic Plan: CHEM-PD Chemistry (PD)

Acad Sub-Plan:

Fellowship / Program:

## ▼ Dates of Appointment

Start Date:

End Date: 08/31/2012

\*New End Date:

Enter Termination Date here

\*Action Reason:

## ▼ Forwarding Information

\*Address Line 1:

Address Line 2:

\*City:

State:

Postal Code:

\*Email ID:

Phone:

## ▼ Professional Information

\*New Position Title:

\*Type of Position:

\*New Institution or Company:

## ▼ Foreign Scholars

Visa Type: UN

Expiration Date:

## ▼ Certificate of Training

Student Email: @yahoo.com

Phone:

Acad Program: CHEM Chemistry

Academic Plan: CHEM-PD Chemistry (PD)

Acad Sub-Plan:

Fellowship / Program:

▼ Dates of Appointment

Start Date: 08/02/2011

\*New End Date:

\*Action Reason:

▼ Forwarding Information

\*Address Line 1:

\*City:

State:

\*Email ID:

▼ Professional Information

\*New Position Title:

\*Type of Position:

\*New Institution or Company:

▼ Foreign Scholars

Visa Type: UN

Expiration Date:

### Look Up

## Look Up \*Action Reason

**Program Action:** Discontinuation

**Action Reason:** begins with

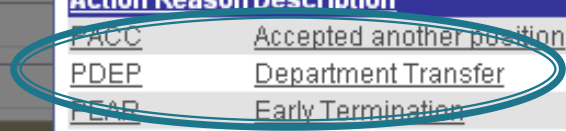
**Description:** begins with

[Basic Lookup](#)

### Search Results

View 100 First 1-8 of 8 Last

Action Reason	Description
PACC	Accepted another position
PDEP	Department Transfer
PEAR	Early Termination
PEND	End of Appointment Term
PPER	Personal/Family Reasons
PQWN	Quit without Notice
PRES	Resignation
RRTN	Failure to Return from LOA



# New Department: STF PostDoc Invite

The image shows a screenshot of a navigation menu with a light beige background. The menu is organized into two columns. The left column contains various system categories, and the right column contains sub-items. The 'STF PostDoc Invite' option is highlighted in red text. A blue and black decorative graphic is visible in the bottom-left corner of the slide.

STF Web Forms	>	
Self Service	>	
STARS Menu	>	
Campus Community	>	Personal Information >
Student Recruiting	>	Personal Information (Stud... >
Student Admissions	>	SEVIS >
Records and Enrollment	>	Checklists >
Curriculum Management	>	Communications >
Student Financials	>	Comments >
Academic Advisement	>	Service Indicators >
Contributor Relations	>	Service Indicators (Student) >
Stanford Utilities	>	Organization >
STF Grad Financial Support	>	Committees >
Set Up SACR	>	STF PostDoc >
PeopleSoft	>	Student Services Ctr (Stud... >
Worklist	>	
Reporting Tools	>	
PeopleTools	>	
My Personalizations	>	

Post Doc Transactions >

Administrative Forms

STF PDOC Type of Position ...

STF Pdoc OtherAffiliations

STF PosDoc Minimum Salar...

STF PostDoc Invite

Stf PostDoc Transaction st

# Department Transfer follows same procedure as a New Appointment:

A non-Stanford email address must be used: e.g. yahoo, gmail, hotmail email account (not @stanford.edu, must be different than email address used on previous appointment invite)

Remember to Add a New Value when creating the Invite



The screenshot shows a web interface for creating a PostDoc invite. At the top, the title "STF PostDoc Invite" is displayed in red. Below the title are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is currently selected and highlighted in dark red. A horizontal red line separates the tabs from the input area. Below the line, there is a text input field labeled "Email ID:". At the bottom left of the form, there is a yellow "Add" button.

# When completing Data Form, the postdoc will be reminded to use his non-Stanford email account, not SUNet ID email

UNIVERSITY

## Postdoctoral Scholar Data Form

Information

Hello, you are logged in as AAARRR

[Click on underlined field names to see additional information about those fields.](#)

Fields marked with an "\*" are REQUIRED.

Current Section

- Personal Details
- Personal Addresses**
- Ethnicity
- Dependents
- Ext. Funding Details
- Education Details
- Work Experience
- Documents
- Finish

Personal Addresses

[Home](#) [Save](#) [< Previous](#) [Next >](#)

\*Email address  MUST match email address used to register with Stanford department.

**Current Mailing**

\*Address Line 1

Address Line 2

\*City

\*Country

Zip

\*State

Phone  Valid Through Date

Permanent address same as above  Yes  No

Please use your permanent home address from your home country

Permanent/Home Mailing Address

\*Address Line 1

Address Line 2

\*City

\*Country

Zip

\*State

Phone  Valid Through Date

# Go to PostDoc Administrative Forms in Axess to start Recommendation Form



The image shows a screenshot of the AXESS navigation menu. The menu is displayed in a light beige color with a subtle grid pattern. The 'WORKFLOW CENTER' menu item is highlighted, and its dropdown menu is open, showing the following options:

- WORKFLOW
- J Scholar Visa Requests
- Postdoc Administrative Forms
- Workflow Home

The main navigation bar includes the following items:

- AXESS
- EMPLOYEE
- STARS
- WORKFLOW CENTER
- ADMIN RESOURCES
- PeopleSoft Admin
- PeopleSoft Favorites



# Select "YES" for Department Transfer

Stf Pdocr Rqst

Stf Wf Transaction

Stf Wf Txn Approvr

## Recommendation Form to appoint Postdoctoral Research Scholars/Clinical Fellows (Trainees)

The following information is required for processing the Postdoctoral Scholar appointment, benefits enrollment, visa petition requests, SEVIS database management, & other appointment processes.

\* Required field + Must match passport

### Transaction Details

Select PostDoc Data Form:

00791322

\*Postdoctoral Request Type:

Is this request for Department Transfer:

No

[Comparative Display of Biographic Data](#)

[Offer Letter](#)

[Complete Information Sheet](#)

### Supporting Documents

Save

Submit

Back

Print

# Termination Codes

*How to Choose the Right Code*

# Termination Codes

- ▶ **PACC – Accepted another position**
  - Use when postdoc ends appointment early to take another position
- ▶ **PDEP – Department transfer**
  - Use when postdoc is transferring to a new postdoc position in another Stanford department
- ▶ **PEAR – Early termination**
  - Use when PI/Department ends appointment early due to loss of funding, change in programmatic need, or poor postdoc performance
  - Early termination procedures apply, please see [http://postdocs.stanford.edu/admin/how-to/early\\_term.html](http://postdocs.stanford.edu/admin/how-to/early_term.html)
- ▶ **PEND – End of appointment term**
  - Use when postdoc has *substantially completed* the appointment term
- ▶ **PPER – Personal/family reasons**
  - Use when postdoc ends appointment early for personal reasons
- ▶ **PQWN – Quit without notice**
  - Use when postdoc ends appointment early without notice
- ▶ **PRES – Resignation**
  - Use when postdoc resigns appointment early
- ▶ **RRTN – Failure to return from LOA**
  - Use when postdoc fails to return from an approved leave of absence

# Postdoc Benefits:

Current Year Rates, ACA Minimums, Waiving Stanford Coverage, and Postdoc Paid Insurance

# Year 2015 Rates

\*Institutional costs are funded from a variety of sources depending on each individual Postdoc's appointment arrangement

\*\*Upon enrollment, eligible family members (spouse, /registered domestic partner and children through age 25, regardless of student or marital status) are automatically covered.

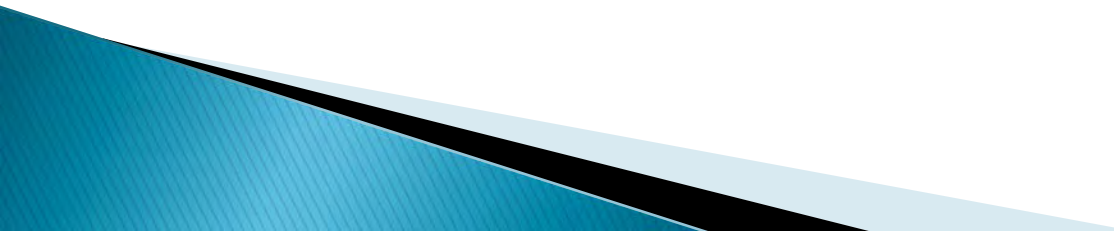
	Monthly Cost		
	Total Cost	Institutional Cost/Allowance*	Your Cost
<b>Medical – Stanford HealthCare Alliance (SHCA)</b>			
Postdoc Only	\$571.16	\$571.16	\$0.00
Postdoc + Spouse/Registered Domestic Partner	\$1,256.55	\$1,005.24	\$251.31
Postdoc + Child(ren)	\$1,028.10	\$873.88	\$154.22
Postdoc + Family	\$1,713.49	\$1,456.47	\$257.02
<b>Medical – Blue Shield of California PPO</b>			
Postdoc Only	\$619.71	\$571.16	\$48.55
Postdoc + Spouse/Registered Domestic Partner	\$1,363.37	\$1,005.24	\$358.13
Postdoc + Child(ren)	\$1,115.49	\$873.88	\$241.61
Postdoc + Family	\$1,859.14	\$1,456.47	\$402.67
<b>Dental – Delta Dental PPO</b>			
Postdoc Only	\$38.20	\$38.20	\$0.00
Postdoc + Spouse/Registered Domestic Partner	\$78.39	\$38.20	\$40.19
Postdoc + Child(ren)	\$75.37	\$38.20	\$37.17
Postdoc + Family	\$125.69	\$38.20	\$87.49
<b>Vision – Vision Service Plan (VSP)</b>			
Postdoc Only	\$6.51	\$6.51	\$0.00
Postdoc + Spouse/Registered Domestic Partner	\$10.97	\$6.51	\$4.46
Postdoc + Child(ren)	\$11.22	\$6.51	\$4.71
Postdoc + Family	\$18.73	\$6.51	\$12.22
<b>Extended Travel Assistance – FrontierMEDEX</b>			
Postdoc + Eligible Family Members**	\$1.25	\$0.00	\$1.25
<b>Disability, Life and Accident (Standard Insurance Company), Postdoc Assistance Program (ComPsych GuidanceResources)</b>			
Short Term Disability	\$15.50	\$15.50	\$0.00
Long Term Disability	\$1.83	\$1.83	\$0.00
Life	\$1.00	\$1.00	\$0.00
Accident	\$0.35	\$0.35	\$0.00
Postdoc Assistance Program (PAP)	\$1.14	\$1.14	\$0.00
<b>Total (Disability, Life and Accident, PAP)</b>	<b>\$19.82</b>	<b>\$19.82</b>	<b>\$0.00</b>

# ACA Minimums

## Medical Benefits must include:

- Ambulatory Patient Services
- Emergency Services
- Hospitalization
- Maternity and Newborn Care
- Mental Health/Substance Use Disorder Services (including behavioral health treatment)
- Prescription Drugs
- Rehabilitative and Habilitative Services and Devices
- Laboratory Services
- Preventative and Wellness Services and Chronic Disease Management
- Pediatric Services, including Oral and Vision Care

## Additional requirements for the policy:

- No pre-existing condition clauses or exclusions
  - Cannot charge higher premium for women than men
  - Medical plan must cover at least 60% of medical expenses (75% for J1 Visa holders)
  - No lifetime or annual limits on dollar value of benefits
  - Out-of-pocket maximum cannot exceed \$6,600/individual and \$13,200/family
  - Deductibles can vary, but cannot exceed the out-of-pocket maximum
- 

# Waiving Stanford Coverage

- ▶ Outside health plans must substantially meet ACA minimums to waive Stanford Benefits
  - There can be no maximum medical benefit limits;
  - No waiting periods or exclusions;
  - Regardless of gender, there must be coverage for maternity and newborn care;
  - Coverage for preventative care (routine exams and lab screenings);
  - Mental & Substance abuse coverage (no maximum visits);
  - Chronic disease management;
  - Prescription coverage;
  - Emergency and ambulatory services;
  - Hospitalization

# Postdoc Paid Insurance

- ▶ A separate policy exception is required for externally funded postdocs who have funding above the minimum requirement and the department requests the postdoc to pay for the institutional portion of the benefits expense.
- ▶ <http://postdocs.stanford.edu/admin/pdf-forms/JobAidPostdocPaidInsurancePremiumsv3.pdf>



# PD Web Forms Job Aids

# PD Web Forms Job Aids

- ▶ Step-by-step instructions for all actions in PD Web Forms can be found at:  
[http://postdocs.stanford.edu/admin/how-to/job\\_aids.html](http://postdocs.stanford.edu/admin/how-to/job_aids.html)

# Upcoming Refresher Training Session

OPA-1351-091715

9:30am - 11:30am

MSOB x140

Thank you!

*Questions?*