JOB AID FOR CHANGE TRANSACTIONS

Purpose: To update the postdoctoral record with Appointment Dates, Faculty, or Funding changes. *Any combination of changes can be processed in the same Change Request Form*

Confidentiality: Information entered in Postdoc Web Forms is part of Student Records. Confidential or sensitive information should not be entered into PD Web Forms.

In AXESS: OPA/Bechtel Center Tab > Postdoctoral Administrative Forms > Change Transactions
OR: CS Admin > Campus Community > STF Postdoc > Postdoc Transactions > STF Postdoc Change Requests

1. **To create a new Change Transaction, click "Add"**
   a. REQUEST TYPE BOX
      i. From the three change types listed, click the appropriate box for each change to be made
         1. One or more changes can be made in the same Change Request Form
         2. The fields for each request type appear after each Request Type box is checked
   b. BIO DEMO BOX
      i. Student ID Field: Enter the student ID number, OR
      ii. Click the magnifying glass to "Look Up" the student ID
         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 current Bio Demo information is populated
   c. APPOINTMENT DATE CHANGE BOX
      i. New Appointment Start Date Field:
         1. DO NOT ENTER A DATE IN THIS FIELD FOR APPOINTMENT EXTENSIONS
         2. Enter a new start date only if the actual start date of the appointment has changed, (i.e., a deferred start date due to visa delays)
      ii. New Appointment End Date (Extensions) Field: Enter the new appointment end date
      iii. "Total Experience with Reappointment Term Included" and "Applicable Research Experience To-Date" Fields are auto-updated with new totals after you tab out of the New End Date Field
      iv. SUPPORTING DOCUMENTS ARE REQUIRED WHEN "TOTAL EXPERIENCE WITH REAPPOINTMENT TERM" EXCEEDS 60 MONTHS. See Job Aid for Sixth Year Change Requests for additional instructions: http://postdocs.stanford.edu/admin/how-to/job_aids.html
   d. NEW FACULTY SPONSOR INFORMATION BOX
      i. Faculty Sponsor ID Field: Enter the Faculty Sponsor ID number, OR
      ii. Click the magnifying glass to "Look Up" the Faculty Sponsor ID
         1. In the Look Up Box enter the faculty surname in the Last Name Field, click "Look Up"
         2. From Search Results, click the name of the Faculty Sponsor
      iii. Faculty Research Mentor Field: Repeat the above steps if there is a Research Mentor change
      iv. Comments Field: Enter any comments regarding the faculty change(s)
   e. NEW ANNUAL SALARY/FUNDING BOX
      i. New Annual Salary Eff Date Field: Enter the date the new annual salary is effective
      ii. **New Funding Description Field(s): In the appropriate New Salary, New Stipend, or New Outside Support Description fields:**
         1. **Provide the following information: US or Foreign; Agency/Fellowship Name; Dates of Funding**
         2. **Entry Example 1: Foreign; Swiss Natl Funding Fllshp; 05/01/16-04/30/17**
         3. **Entry Example 2: US; John Doe Gift Funds; 10/01/16-09/30/17**

    iii. Amount Fields: Enter the funding amount(s), ensuring that the total (or combined total) meets or exceeds the Required Salary listed
f. ADDITIONAL INFORMATION REGARDING TERMS BOX
    i. Enter any additional information regarding funding terms
g. COMMENTS BOX
    i. Enter any comments for Approvers or OPA (comments are visible to all, including the postdoc)
h. Click “Save” to save the form and return later; OR click “Submit” to route the form for approval
i. **REQUIRED for Outside support: Please upload a copy of the new funding letter to the postdoc’s previously approved Recommendation Form**
j. An email notification is automatically generated to the Postdoc

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

a. From Postdoctoral Administrative Forms, click the “Change Transactions” radio button
b. To search for all Change Forms, click “Search”
c. To search for a specific Change Form:
    i. In the search criteria fields, enter the postdoc’s First and Last Names, click “Search”
    ii. From Search Results, click the Transaction ID of the Change Form

3. To search for an EmplID after the Recommendation Form is approved (if you do not have access to PeopleSoft or GFS to search for the student ID)

a. From AXESS, click the Postdoc Administrative Forms tab
b. Click the Change Transactions button
c. Click "Add"
d. Click the magnifying glass to the right of the Student ID field
e. In the Look Up box, enter the postdoc’s first and last names
f. Click "Look Up"
g. The student ID is displayed in the Search Results
h. Write down (or copy and paste) the ID number
i. Exit the look up box; exit the change form without saving or submitting