Postdoctoral Administrators Quarterly Meeting

February 4, 2016
10:00 a.m. – 11:30 a.m.
Clark Center S360

Agenda

- ❖ **Opening Remarks (Sofie)**

- ❖ **Programs Updates (Robin)**

- ❖ **Postdoc Benefits Office (Denise)**

- ❖ **Outside Funding Exchange Rates (Shannon)**

- ❖ **Postdoc Job Aid Updates (Tammy)**

- ❖ **J-1 Scholar to H-1B Staff Transition (Tammy)**

- ❖ **PHI in Unsecure Emails (Tammy)**

- ❖ **5th and 6th Year Extensions (Al)**

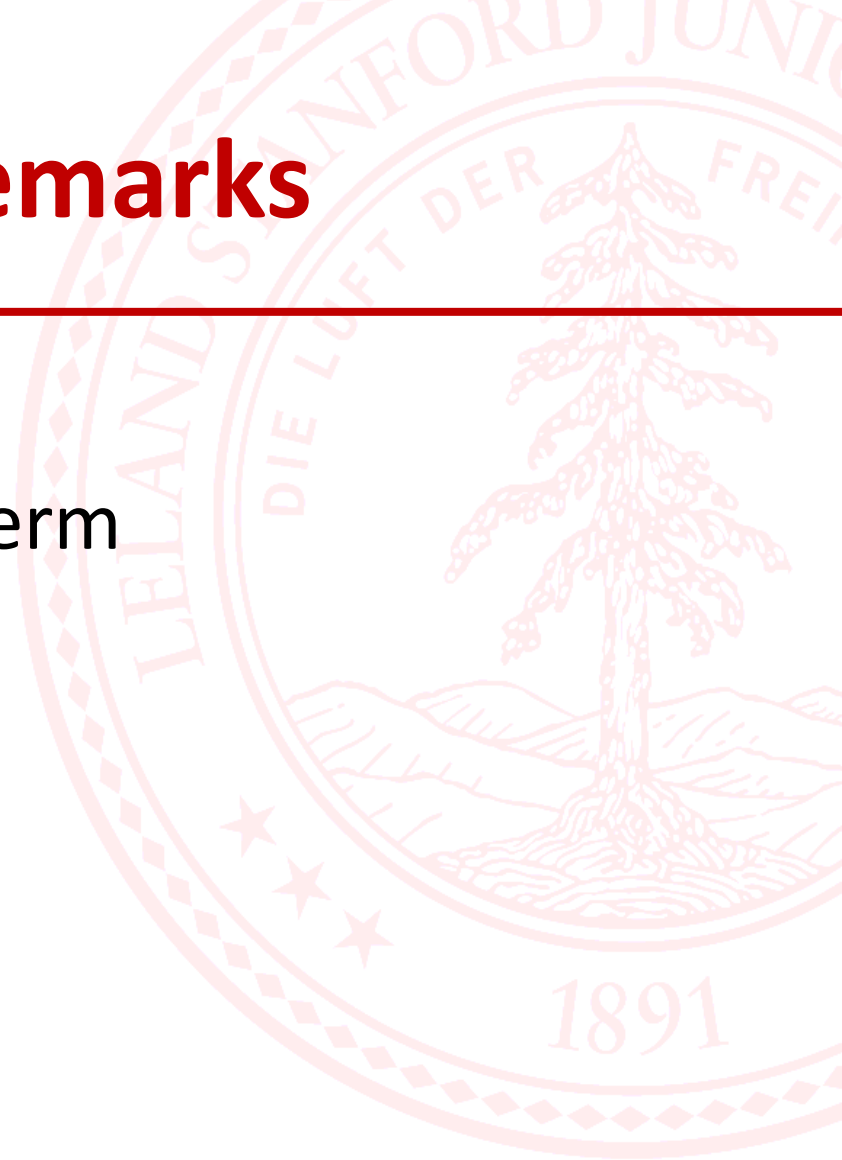- ❖ **Clinical Trainee Appointments (Al)**

- ❖ **Drop In Open Labs (Al)**
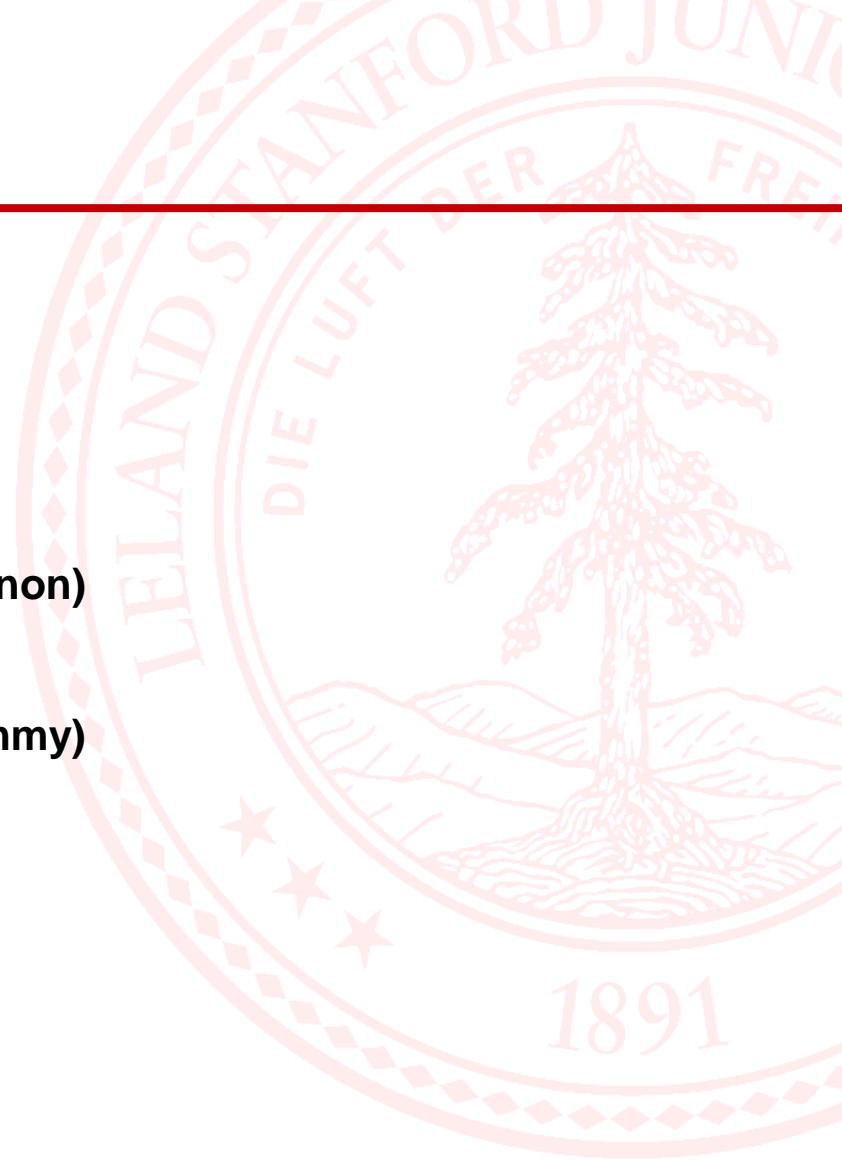
Opening Remarks

Dr. Sofie Kleppner

Opening Remarks

- Go Pass Update

- Minimum Appointment Term

- Hardship Fund

Program Updates

Robin Sugiura

Program Updates

- **Lots of Ongoing and New Programs!**
- Scientific Management Series — Winter quarter Thursday night speaker series
  - 6 sessions left:
    - Obtaining and Negotiating a Faculty Position
    - Getting Published
    - Starting Up Your Lab
    - Negotiation Skills I and II
    - Mentoring for Academia and Beyond
- Academic Chats — monthly lunchtime discussion series
  - February on Blended Learning
  - March on Online Learning
- 2-day Mentoring in Research workshop coming up in late February

Program Updates

- New Postdoc Pedagogy Journal Club being kicked off on Feb 10

- Not announced yet, but Team Science workshop led by NIH Ombuds in late March

- Vocal Yoga for Postdocs in April-May

- Improv for Communication workshops coming soon

- Grant Writing Academy session on Scientific Storytelling in the works

Program Updates

- **PLUS, More NEW Programs In Development!**
- New Wellness programs
  - Including Work-life balance
  - Fitness classes
  - BeWell speakers
  - Interpersonal Skills
  - Life and Work Management
  - Mental/Emotional Support, etc.
- New Teaching training and opportunities
- New programs and opportunities to support Diversity and Community-building

Postdoc Benefits Office

Denise Livengood

RAF and RAFC In GFS

- A Postdoc's premiums can be charged to the Benefits Pool if all of the following criteria are being met:
    - **ALL** GFS salary lines that have overlapping dates have been entered with the RAF Assist Type
        - Example of Incorrect Entry:
            - AS001 – RAFC 2/1/2016 – 2/10/2016--- 3 hrs (fringe rate is 8.8%)
            - AS002 – RAF 2/1/2016 – 2/29/2016---37 hrs (fringe rate should be 24.3% but because of the overlapping RAFC line only the 8.8% fringe rate is charged)
        - Example of Correct Entry:
            - AS001 – RAF 2/1/2016 – 2/10/2016--- 3 hrs
            - AS002 – RAF 2/1/2016 – 2/29/2016---37 hrs
    - the salary pay lines were approved in time
        - In time means by the last day of the month so that the lines will be in approved status when the report is run on the 1st of the following month.
    - the Postdoc is being paid at least 20 hours salary for a *full* month

PTA Info Needs Review on a Regular Basis

- 65 PTA entries were rejected by Oracle due to various reasons:

-PTAEO VALIDATION ERROR -XXDLPV013: Expenditure Item Date is not between Task Start and End Dates-XXDLPV018: Award Status is other than ACTIVE or AT RISK-XXDLPV020: Expenditure Item Date is not between PreAward/Award Start and Award End dates
-PTAEO VALIDATION ERROR -XXDLPV035: Expenditure Type is not allowed for this Project (Transaction Control)
-PTAEO VALIDATION ERROR -XXDLPV018: Award Status is other than ACTIVE or AT RISK-XXDLPV020: Expenditure Item Date is not between PreAward/Award Start and Award End dates
-PTAEO VALIDATION ERROR -XXDLPV013: Expenditure Item Date is not between Task Start and End Dates
-PTAEO VALIDATION ERROR -XXDLPV018: Award Status is other than ACTIVE or AT RISK
-PTAEO VALIDATION ERROR -XXDLPV021: Award is not found in system
-PTAEO VALIDATION ERROR -XXDLPV027: This Award does not fund this project-XXDLPV028: There is no budget for this Award/Project combination

- PTAs that are rejected are replaced with the department's guarantee account

- Guarantee account financials should be checked every month to alert you to the necessary updates needed in GFS or ClearBenefits
  - A 279 Expenditure Report run In Reportmart3 for your Guarantee Account is sufficient and will show if a postdoc's health premiums were charged to that account. Either a GFS entry needs to be fixed or a ClearBenefits PTA needs to be fixed (or both).

Benefits Termination Policy

COBRA regulations state that we must notify our plan administrator within 30 days of a termination.

What this means for departments:

- To avoid paying health premiums beyond the termination date, an approved termination form must be received by the Postdoc Benefits Office by 3pm on the last day of the month in which the postdoc is terminating.

- Termination forms received 25 days or more after the termination date will have a termination date of the last day of the current month

- No longer able to refund premiums beyond the current month

Postdoc Benefits Helpful Hints

- Effective Jan 1, 2016, Aetna became the medical insurance carrier/administrator
- Postdocs filling out [arrival forms](#) will write Aetna for the name of the insurance provider
- J1 visa holders DO NOT have to enroll in Aetna POS Choice II
- Ending a pay line in GFS does not terminate a postdoc nor end their benefits
- A termination form must be initiated by the department administrator in PeopleSoft
- Information about this process can be found on the Office of Postdoctoral Affairs [website](#)

Outside Funding Exchange Rates

Shannon Monahan
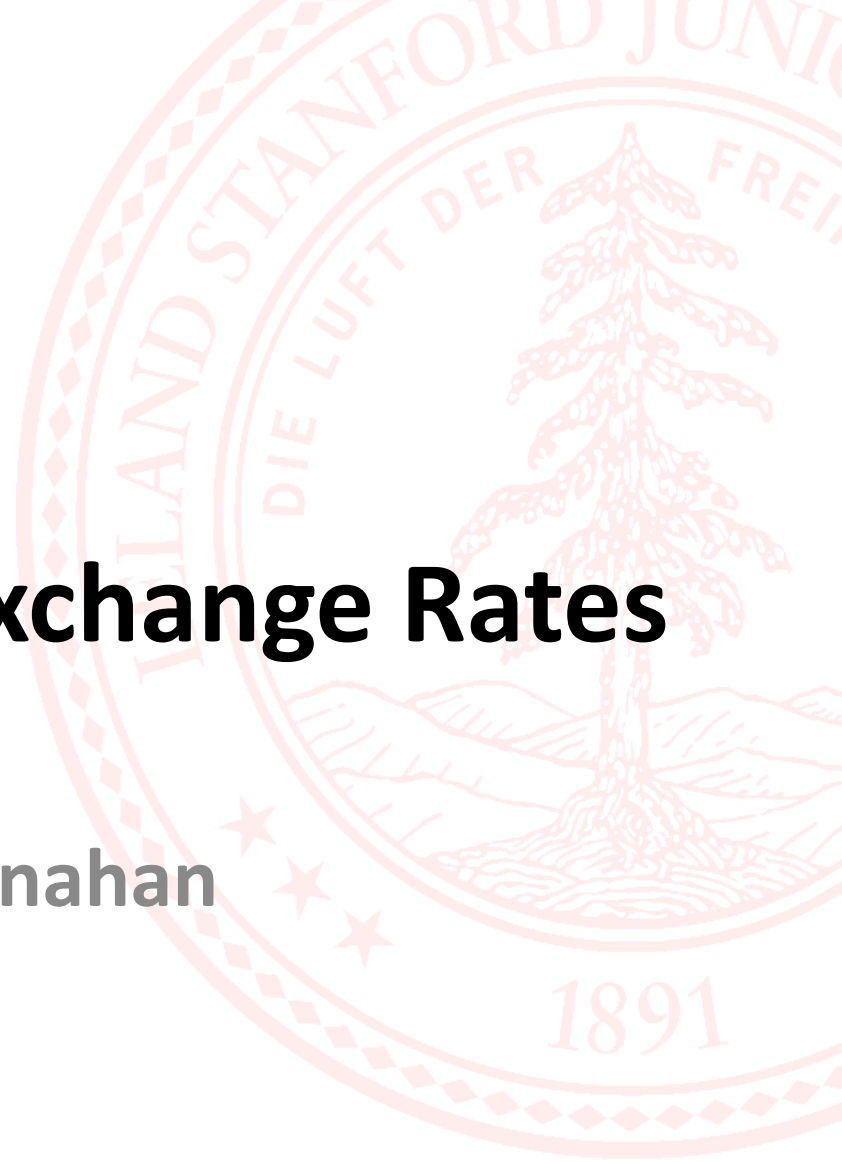
Outside Funding Exchange Rates

- Exchange rates have been extremely volatile in all markets as of late

- Reminder: Departments are responsible for any shortfall is funding below the minimum—this includes fluctuations in exchange rate

- Rates should be re-assessed at times whenever a deposit is made to the postdoc's account
  - For monthly deposits, quarterly review is reasonable, but shortfalls must still be covered retroactively

Postdoc Job Aid Updates

Tammy Wilson

Postdoc Job Aid Updates

- Many Postdoc Job Aids are recently updated:
  - Postdoc Web Forms job aids now include helpful hints and reminders
  - Other Postdoc Job Aids are updated with current processes (Postdoc-Paid Insurance, 6th Year Extensions, etc.)
  - http://postdocs.stanford.edu/admin/how-to/job_aids.html
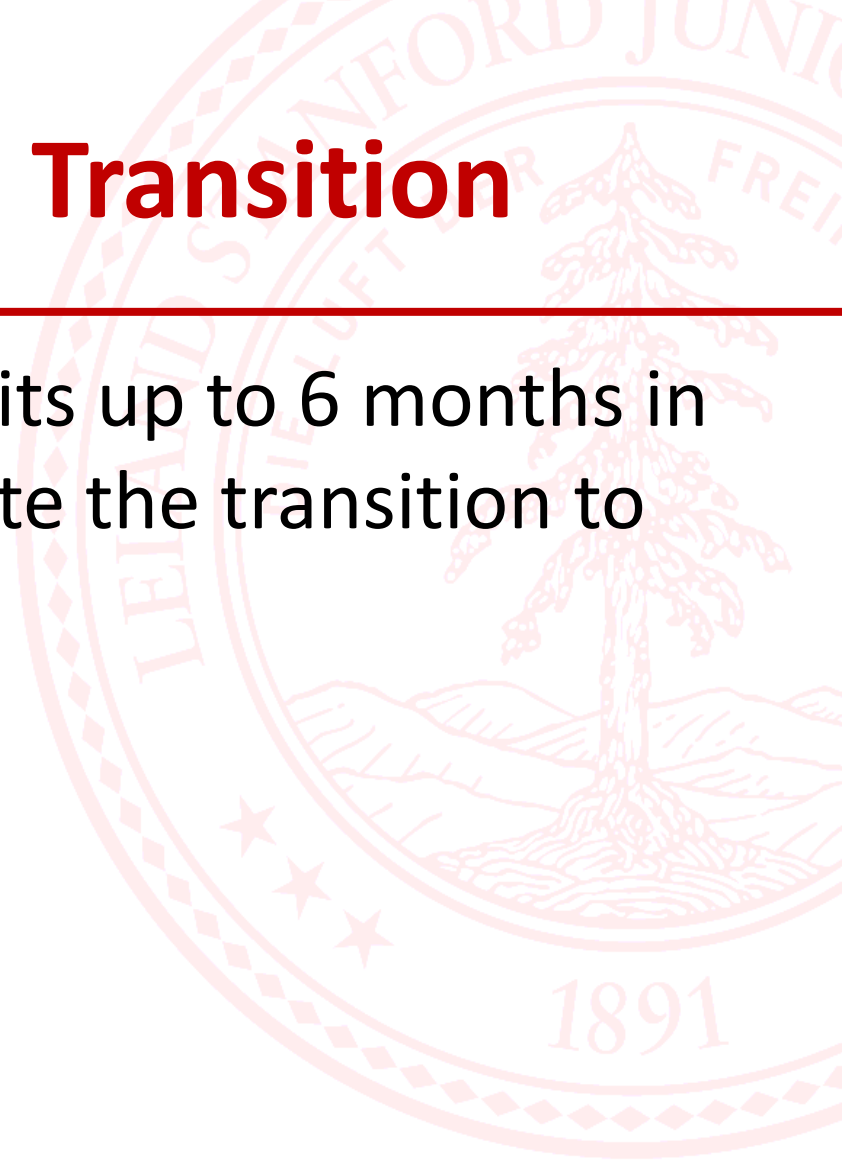
J-1 Scholar to H-1B Staff Visa Transition

Tammy Wilson

J-1 to H-1B Visa Transition

- The J-1 Scholar Visa permits up to 6 months in a Staff position to complete the transition to an H-1B visa.

PHI In Unsecure Emails

Tammy Wilson

PHI In Unsecure Emails – Don't Do It!

- When emailing postdoc information to OPA
  - Do NOT include documents containing PHI (SSNs, Passport, Visa, etc.)
  - For new appointments and reappointments:
    - Upload documents with PHI to recommendation form
  - For fellowships and other instances:
    - Drop off documents in person at OPA, or
    - Note "SECURE" in the email subject line
  - https://uit.stanford.edu/guide/riskclassifications

5th and 6th Year Extensions

Alistair Murray

5ᵗʰ and 6ᵗʰ Year Extensions

Processing Reappointments/Extensions: Administrators may reappoint (or extend the current appointment) of their postdoctoral scholars by submitting a Change Form via the PeopleSoft Web Forms.

Fifth Training Year Requests
For reappointments that extend beyond 48 months (but do not exceed 60 months) of postdoctoral research experience (at Stanford or elsewhere), please read RPH 10.3, Section 2F & G, and submit the following documents in PDF:

1. A written statement from the Faculty Sponsor;

2. An updated scholar CV;

3. Confirmation of the IDP meeting date of the Faculty Sponsor and postdoc;

4. A copy of the fellowship award letter (for requests based on the completion of a nationally or internationally competitive postdoctoral research fellowship);

5. A copy of the accepted job offer letter (for requests based on the need to bridge a short period of time to an accepted job offer start date).

5th and 6th Year Extensions

- When submitting 5th or 6th Year Training appointment extensions, you should always review Months of Applicable Experience. If you determine the months recorded in the system are incorrect go to the section How To: Calculate Research Months

Months of Applicable Experience Prior to this Appointment:	2
Months of Current Appointment:	58

- Research Experience Calculator MUST be provided along with other supporting documents. See http://postdocs.stanford.edu/admin/how-to/prior_experience.html

5th and 6th Year Extensions

Sixth Training Year Requests

For reappointments that extend beyond 60 months (cannot exceed 72 months) of postdoctoral research experience (at Stanford or elsewhere), please read RPH 10.3, Section 2F & G, and submit the following documents in PDF:

1. Sixth Year Extension Request Form – PI (with noted supporting documents);

2. Sixth Year Extension Request Form – Postdoc (with noted supporting documents);

3. A copy of the fellowship award letter (for requests based on the completion of a nationally or internationally competitive postdoctoral research fellowship);

4. A copy of the accepted job offer letter (for requests based on the need to bridge a short period of time to an accepted job offer start date).

5th and 6th Year Extensions

- If 2.F exceptions to policy do not apply, 6th training year cases require formal review by the Faculty Committee on Term Limit Exceptions

- Petitions must be submitted at least 3 months prior to appointment end date

- Research Experience Calculator MUST be provided along with other supporting documents. See http://postdocs.stanford.edu/admin/how-to/prior_experience.html

Clinical Trainee Appointments

Alistair Murray

Clinical Trainee Appointments

- Review Postdoc Web Forms Job Aid:
- http://postdocs.stanford.edu/admin/how-to/job_aids.html

- Required documents to be uploaded for approval by OPA are copies of:
- 1. MD Diploma;
- 2. CA Medical License;
- 3. Completely filled, Initialed and Signed Patient Contact Care Form;
- 4. Billing Agreement, if applicable; and CV.

Clinical Trainee Appointments

- **Residents and Clinical Fellows** who apply for and are awarded Research grants, sponsored projects and fellowships must have an academic appointment with Stanford University. These trainees must be transferred from SH&C to OPA and appointed as Clinical Trainee.

- **Reappointments:**
  - Required documents to be given to GME on an annual basis are copies of:
  - 1. Completely filled, Initialed and Signed Patient Care Contact Form;
  - 2. Copy of original offer letter;
  - 3. Email notification from OPA of the appointment approval.

Drop-In Open Labs

Alistair Murray

Drop-In Open Labs

- Open Labs for Help with Postdoc Web Forms (with OPA staff member):
  - First Friday of every month, 9:00 am – Noon
  - NOTE: NEW LOCATION for select Postdoc Open Labs
    - **1265 Welch Road, MSOB, x140**
    - Postdoc Open Labs at MSOB are staffed only by OPA (no PeopleSoft/GFS)
    - MSOB does not have computers, so you may want to bring your laptop
    - *Postdoc Policy and Web Forms trainings are now scheduled on an as needed basis during Open Labs*

- PeopleSoft Open Labs for help with GFS, other PeopleSoft systems and STARS:
  - Every Friday, 9:00 am – Noon
  - [Birch Modular, Lab B (215 Panama St)](#)

Open Forum

Questions?

HelpSU.stanford.edu

(Category: "Student Services"; Request Type: "Postdoctoral Affairs")