PeopleSoft Project

Postdoc Web Forms

What to Expect and How to Prepare
Why Do This? Issues

1. Insecure handling of protected private information.

2. Inefficiencies
   • Incomplete paperwork
   • Incorrect paperwork

3. Workflow
   • Status of transactions
   • Notification to administrators, postdocs and faculty

4. Reporting
   1. Giving you the tools to track and report on all postdocs in your department
Project Scope, includes

1. Web Forms and interfaces to support all Postdoc administrative processes and system notifications

2. Document upload, storage, and management features to support submission and management of required documentation in electronic format

3. Integration with SEVIS/Bechtel for visa administration

4. Tracking of current processes and of upcoming end dates of appointments, provisional appointments and other appointment holds

5. Reporting of International Activity for postdocs (i.e., Form 990 data)

6. Migration of historical data from OPA’s Filemaker database

7. Queries to support meaningful searches on Postdoc data within the PeopleSoft system
What Does It Mean For Common Tasks?

1. New Appointments
   - Administrator starts the appointment process online.
   - Postdoc enters his/her data. Uploads diploma, CV, external funding letters…
   - Administrator enters department/appointment data. Uploads any other necessary documents.
   - Faculty Mentor/PI approves online
   - Chair/Proxy/DFA reviews and approves
   - Offer Letter generated online. Accepted online by postdoc
   - Packet received and reviewed online by OPA
   - GME notified for Clinical Fellows

2. Appointment Changes, Terminations and Leaves of Absence: to be submitted online.

3. At any time, administrator can query PS for his/her postdocs
Workflow Roles

- **Administrator (required):** entry of appointment information.

- **Coordinator (optional):** review of Administrator submissions for compliance with university policy.

- **Chair/DFA/Proxy (required):** signs-off on Department commitment to appoint a postdoc. Faculty member has the funding, has the project; term of appointment, special arrangements; salary appropriateness. Other issues.
Training Requirements (updated 11/15)

• For Administrators – all of the following:

  1. PeopleSoft Concepts and Compliance (online)

  2. PeopleSoft Postdoctoral Administration:

    • In-class attendance required in December and early January

    • UPK and Online Training Modules in Place in January 2011
Project Team

• Project Expert Partner Group:
  Bernadette Romo (Anesthesia), Patty Winningham (Pathology), Angela Estrada (Neurology&Neurosurgery), Christina Kasson (Med/Oncology), Vanessa Bravo (Dev Bio), Ronda Fenton (FSI), Tara Ilich (Earth Sciences)

• Project Manager: Tricia Richter, AS

• Project Lead: Shannon Monahan, OPA