PD WEBFORMS SYSTEMS TRAINING

Annelies Ransome
Associate Director for Administration

Sept. 2011
Today’s Agenda

- Policy Resources & Reminders
- Roles, Authority and PeopleSoft
- New Appointments
- Change Form
- Termination
- Known Issues
- HelpSU
Confidential Information
Reviewing Information in PD Web Forms
Tips for Recommendation Form
Searching for Records in PD Web Forms
Oct. 1\textsuperscript{st} Salary Changes
LOA Forms
Departmental Transfers
Where to Find OPA Policies

- OPA’a Admin Site: http://postdocs.stanford.edu/admin/

- Postdoc Administrator Blog: http://postdocs.stanford.edu/admin/blog/
  (The Blog has the slides from Al’s recent Policies & Procedures training.)
Important Reminders:

After August 12, 2011, all transactions will be done via the PD Web Forms only.

Questions sent to postdocaffairs@stanford.edu will receive an auto-reply instructing sender to use HelpSU.
Roles & Authority
Things to Know: Authority

- Authority for PD Web Forms granted by OPA.
  - You will receive an email notice when you have been granted the four sets of privileges you need to work in the system.

- Role #3 designates Roles #1 and #2
  - Submit via Help SU.
  - Info needed: Full legal name, SUNet ID (text, not #), email address and phone number.

- Role #3 designated only by faculty Department Chair or Division Chief.
Role #1: Department Admin Entry - Required

- Point of contact for the postdoc and the faculty member regarding paperwork: new appointments, leaves, extension of appointments and termination of appointments.
- Coordinates with other department staff, such as finance or faculty affairs, on funding questions.
- Submits the DS-2019 and makes the funding attestation required for international scholars.
- Provides a departmental and/or lab orientation for the new scholar
- Must be familiar with Stanford’s policy and procedures related to postdoctoral scholars.
- Typically the same person who enters the GFS lines for the scholar.
Role #2: Dept. Coordinator (OPTIONAL)

- Useful for large departments (50+ postdocs) or departments with highly decentralized operations or affiliated research centers.
- In such areas, administrative associates may have the Department Admin Entry role while the Coordinator role is the one staff member with a deeper knowledge of postdoctoral policy and procedures can oversee the process for the whole Department or large unit. The Coordinator reviews the administrative associates' work before an offer is extended to the postdoc.
- Is first point of contact for the Administrative Associates for policy and procedure questions.
- Reviews the Administrative Associates’ work for completeness and adherence to university policy, including the funding level and the duration of appointment.
- Ensures that the proposed start date allows sufficient processing time for department and University approvals, including time required for international scholar visas.
- Reviews any special additions made to the offer letter, to ensure they do not conflict with university policy.
- For actions that fall outside of university policy: reviews the sponsoring faculty’s request for policy exception and advises the faculty member on alternatives.
- May assist the Chair/Desigee, and review each postdoctoral appointment in respect to department-specific policies and context.
- May not report to the appointing faculty member(s).
A postdoctoral appointment at Stanford is a contract between the University, the faculty sponsor and research mentor, and the postdoc. For the University to approve a recommendation to appoint a postdoc, departmental approval must be received. This authority rests with the Department Chair (or Division Chief in the School of Medicine), and is delegated to the Department Manager/DFA (or Division Manager in the School of Medicine).

**Required Approver:** Reviews and Approves Transactions in Workflow

- Represents the department.
- Understands and act upon concerns regarding equity in funding level among all postdocs in the department have been examined.
- Confirms that the faculty member has the funds, space, etc necessary to make the appointment commitment for the duration of the proposed offer, and is in a position to bring the candidate to Stanford-- for example, there is no conflict of interest or pending departure of the faculty member to another institution.
- Confirms departmental approval of any special arrangement, such as concurrent postdoc/instructor appointments, or agreements regarding pursuing a degree while at Stanford.
- Does not report to the appointing faculty member.
PeopleSoft Learning Center

https://www.stanford.edu/dept/as/sandhr/learnps/index.html

PeopleSoft Learning Center

*Online Learning: Demos of PeopleSoft Processes*

Welcome to the PeopleSoft Learning Center. This site provides information for users of the PeopleSoft Student Administration and HR modules. Those who use the PeopleSoft Learning Management System (known as “STARS” at Stanford) should be sure to see the STARS Learning Center.

New PeopleSoft users may want to:

- Attend an Open Lab (Friday mornings, 9am to noon, Arguello Labs @427 Arguello Way)
- Check the list of Frequently Asked Questions
- Learn about navigation tools in PeopleSoft 9.
- See online demonstrations of PeopleSoft processes.

Point your browser to http://axess.stanford.edu to access the PeopleSoft system.

If you experience problems logging in to the Axess portal, first try clearing your browser cache before submitting a HelpSU request for assistance.

New PeopleSoft Users: Required Training

New users must fulfill training requirements before being granted access to the PeopleSoft system. Training requirements vary depending upon what function(s) you will perform in PeopleSoft.

- ALL New Users must first complete the PeopleSoft Concepts & Compliance training module via Online Learning.
- HR Users:
  See the HR Data Services’ website for requirements.
- STARS Learning/Enrollment Administrators:
  See the STARS Learning Center for requirements
- Student Administration Users:
New Appointment: Inviting a Postdoc
Data Required by the System to Invite Postdoc

- Postdoc’s First and Last Name
- Postdoc’s email address to be used until they arrive on campus
- Other departmental details provided to you by hiring faculty member (follow your group’s internal practices and policies).
PeopleSoft Tab in Axess

Connect to PeopleSoft HR/SA

PEOPLE SOFT USAGE AGREEMENT
BY CLICKING THE LINK BELOW YOU INDICATE YOUR AGREEMENT WITH ALL OF THE FOLLOWING STATEMENTS:

One
I understand the regulations regarding the use of all data in the PeopleSoft records.

Two
I accept responsibility for entering and maintaining accurate data in compliance with applicable laws and University policy.

Three
I accept responsibility for complying with the Federal law and University policy concerning the privacy rights of students, student applicants, employees, and job applicants.

Four
I understand that a breach of this agreement can be cause for disciplinary action, up to and including termination of employment.

I agree to the above

Workflow

Workflow Home
Initiating a Postdoctoral Appointment (in Axess)
Postdoc Invitation: click on the Add a New Value tab
Administrator must have a valid personal email address (not an @stanford.edu address) for the postdoc candidate. Enter the address and click “Add.”

Do not skip this step - cannot add email address later!
A STF Postdoc Invite screen opens up:

1. Enter the candidate’s first and last name as they should appear in PeopleSoft.
2. Click on the magnifying glass for DeptID and select the Acad Org for which you are authorized to recommend postdocs.
NOTE: If you cannot find the faculty member in the list, contact reg-courses@stanford.edu requesting the addition of the faculty member in the advisor table. You may not proceed without this setup being complete.
Do not remove text from the Email text but you may ADD text. When you save, the Email text will automatically update with the name and department information in the body of the message.
Your email to the prospective postdoc has been sent. (25400,21)
Click Save
POSTDOC’S VIEW OF INVITATION
Dear Annie Rennie,

Annelies Ransome in Chemistry at Stanford University has initiated the process to offer you a postdoctoral appointment at Stanford. Please go to http://secureportal.stanford.edu, register as a user on the site, and complete the "New Postdoctoral Scholar Information Sheet" form.

NOTE: When registering on the site, you must use the same email address where you are receiving this notification.

Provide your demographic information and academic history on the form, and upload electronic copies (in .pdf format) of the following required documents:

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:
   a. all identification pages of your passport
   b. any previous visa-related documents such as IAP-66, DS-2019, US visa stamps on passport, OPT application or OPT-EAD Card, any receipts of pending change of status petitions.
   c. the same documents are required for any dependents (spouse/children) you intend to have join you at Stanford.

4. If your funding while at Stanford will be covered through an externally-awarded fellowship, government agency or other external sources, a copy of your funding letter is required.

5. Additional documents may be required by your department as noted below, such as copy of your CA medical license if you will be a clinical fellow at Stanford.

You may save and return to the form until you are ready to submit it. Your appointment process will not start at Stanford until you have submitted your information sheet and the above documents. You will receive an email notification when your form has been successfully submitted and approved.

For any questions regarding this important step to initiate your Stanford appointment, contact Annelies Ransome at pscs-dev-emails@stanford.edu.
Postdoc goes to the designated secure portal for Stanford and registers a Username and Password.

Welcome!

The Gateway to Stanford is a secure Portal where individuals in the early stages of joining the Stanford community may submit required information to begin their association with the University.

The site currently provides application forms for the following:

**International students and job applicants:**

Use this site to initiate Employment Visa requests.

**Postdoctoral scholars:**

Use this site to submit information required for processing your postdoctoral appointment.
Postdoc must use the same information used in the Invitation email: same email address and first and last names throughout the process.
About the Gateway:

Registering as a Gateway user gives you access to the forms you need to complete and submit as an international student or employee or as a prospective Postdoctoral Scholar.

Once your acceptance/appointment at Stanford is complete, you will be assigned a Stanford University Network ID (SUNet ID) and will have access to the University network and online services via the Axess portal.

User Registration

- **First Name**: Annie
- **Last Name**: Rannie
- **User Name**: saarr
- **Email**: [email protected]
- **Password**: ••••••
- **Retype password**: ••••••

I have read and agree to the Terms and Conditions related to the creation and use of a Gateway to Stanford account. [I Agree]
A message will appear confirming that a username and password have been created. Postdoc must then enter them below and click login.

Welcome!

The Gateway to Stanford is a secure Portal where individuals in the early stages of joining the Stanford community may submit required information to begin their association with the University.

The site currently provides application forms for the following:

**International students and job applicants:**

Use this site to initiate Employment Visa requests.

**Postdoctoral scholars:**

Use this site to submit information required for processing your postdoctoral appointment.
The Postdoc must click on the New Postdoctoral Scholar Data Form to start the process. NOT on the other links!
The Data Form walks the postdoc step-by-step through various sections. Postdoc should save and click next to move to next section.
Underlined field labels mean that more information is available. Click on the underlined label and a pop-up box appears providing more information.
Form View for Foreign Scholar

**Postdoctoral Scholar Data Form**

Please enter your information below. **ATTENTION FOREIGN SCHOLARS:** Information must match the personal information on your and your dependents’ passports.

**Personal Details**

- **First Name:** Annie
- **Middle Name:**
- **Social Security Number:** 222222221
- **Date of Birth:** 12/25/1985
- **Birth City:** London
- **Birth Country:** United Kingdom
- **Sex:** Male
- **Marital Status:** Married

If previously at Stanford in any status, please provide Student ID #:

- **Country of Citizenship:** United Kingdom
- **Country of Residency:** United States
- **Visa status requested at Stanford:**
- **What is your current US Immigration status?**

Will you have dependents accompanying you to Stanford? **Yes** **No**
Pop-Up Help Info
Pop-Up Additional Information
The email address here MUST be the same as the one that received the invitation to apply email from the administrator.
Postdoc may skip this page.
If the postdoc will have dependents, click Add Dependent and enter his/her information.
Information for dependents who are coming with a foreign scholar to Stanford is required. Click Add Dependent to save information.
Funding Information: Postdoc should upload any external funding letters, award notices here, where applicable.

If more than one funding source is provided, click Add Funding Details to provide information about the second source.
Academic History: Click arrow and enter name of institution. If institution does not exist, postdoc should search for “Unlisted University”

Do NOT enter residency or fellowship information. Only Degrees are provided here. Residencies, or postdoctoral fellowships and other training should be entered under Work Experience.
Click Add Education Details to add more degrees. When done, Click Next.
Work Experience: Click Add Work Experience here.
Enter information about positions held.
If none, cancel and move on to the next section.

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

**Work Experience**
- **Position/Title**: Researcher
- **Company/Institution**: Quantity Matters
- **City**: Washington
- **State**: DC
- **Country**: United States
- **Primary Work Activity**: Research
- **Start Date**: 06-01-2011
- **End Date**: 08-01-2011
- **Current Employer**: No
Postdoc can edit entries
Document Uploads: Postdoc must provide the documents listed below.
REMEMBER: .docx attached files do not open in the system at this time. Must be .doc files or PDFs.
Final Step: Must Click I agree in order to Submit the application.
Confirmation that Form is submitted. Form and uploaded documents now go to the administrator for review and approval in Workflow.
From: workflow@psprcuat20.stanford.edu
To: postdocaffairs@stanford.edu
Cc: 
Subject: Test message: Information sheet with a transaction id # 00791321 has been submitted.

Thank you for submitting your Information Sheet and the required documents to start your postdoctoral appointment at Stanford. The information has been sent to Rania Sanford for review. Upon review, you will receive an email when an offer may be extended.

For any questions about this review and the various steps in the process, contact Rania Sanford at pscs-dev-emails@stanford.edu.
Confirmation email to Administrator (Role #1) and to faculty member after submission, with steps on next steps.

Subject: Test message: Information sheet with a transaction id 00791322 has been submitted.

Annie Rannie has submitted his/her information to initiate the paperwork for his/her postdoctoral appointment at Chemistry. The information has been sent to you for review and verification. Please check the completion of all information provided in the Information Sheet and review the documents that the prospective postdoc has provided in accordance with University policy. The postdoc is required to upload the following documents before you can proceed with the process:

1. Postdoc doctoral diploma. If a diploma is not available, an official letter from a university official, typically the registrar, indicating completion of your doctoral degree requirements is necessary. Letters from doctoral advisors are not accepted.
2. Current CV.
3. If the prospective postdoc is not a US citizen:
   a. all identification pages of your passport
   b. any previous visa-related documents such as IAP-66, DS-2019, US visa stamps on passport, OPT application or OPT-EAD Card, any receipts of pending change of status petitions.
   c. the same documents are required for any dependents (spouse/children) the prospective postdoc intends to have join him/her at Stanford.
4. If funding while at Stanford will be covered through an externally-awarded fellowship, government agency or other external sources, a copy of funding letter is required showing amounts and award period (start and end date).
5. Additional documents required by your department as noted in your communication with the prospective postdoc, such as copy of your CA medical license for Clinical Fellows.

If any of the above document is missing, you must return the Information Sheet to the prospective postdoc. The postdoc must provide these documents in order to receive an offer of appointment.

What you need to do next:
After you review the completion of the information and documents provided:
1. Go to <<Link For Recommendation Sheet>> and complete the Recommendation Form to appoint your prospective postdoc.
2. Obtain any additional terms regarding the postdoc offer in order to be added to the offer letter language. The online Recommendation Form will have a section designated for this addition.
3. For international postdocs only: Complete DS-2019 Form online and submit it, or complete the I-189 visa request form if an H1B is requested for the prospective postdoc (download the form from the Forms section under Administrators at http://postdocs.stanford.edu) and submit it online at postdocaffairs@stanford.edu.
4. Submit your completed Recommendation Form. It will then be sent for approval by your Department Coordinator (if required), Faculty Sponsor, Faculty Research Mentor (if different from Sponsor), and your Department Chair/Division Chief or their designee.
5. Monitor the progress of the workflow and the status of your appointment online at <<Where?>>

When all approvals are secured, an offer letter will be generated for the prospective postdoc to accept online. The letter will include any additional terms you added in the Recommendation Sheet.

Upon accepting the offer online, all forms and documents will be sent to the Office of Postdoctoral Affairs for review and university approval.

If you have questions about postdoc-related policies or procedures:
3. If you are unable to find your answer, you may contact the Office of Postdoctoral Affairs at postdocaffairs@stanford.edu.
Workflow Notification that Administrator (Role #1) needs to go into Workflow to review and approve.

Subject: Test message: Rannie, Annie has requested your on-line approval for Initial PostDoc Request

A request for Initial PostDoc Request has been submitted for your review and approval.

LAST NAME: Rannie
FIRST NAME: Annie
TRANSACTION ID: 00791322

Please log into Axess (https://axess.stanford.edu/) and click on the Employee Information tab on the top bar. Then select Workflow Home in order to review the request.
Workflow (Known Issue): Documents take up to 60 minutes to show up from SecurePortal. *This will be fixed.*
45 Minutes Later (after Browser Refresh too)...

Authorization Agreement

Supporting Documents

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Date/Time</th>
<th>View</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>website_list.pdf</td>
<td>2011-03-12 09:35:04.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
<tr>
<td>pdoc uploads: shot PNG</td>
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<tr>
<td>OPA Tips &amp; Tricks in New Module.docx</td>
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<td>Koala.jpg</td>
<td>2011-03-12 09:35:05.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
</tbody>
</table>

Buttons:
- Approve
- Return
- Decline
- Print

Back to Workflow Home
Data entered by PostDoc **MUST MATCH** information on DS2019, passport and/or visa.

If *any* data is incorrect, e.g., birth date, full name, etc., Role #1 must **RETURN FORM TO POSTDOC via WorkFlow**.
New Appointment: Recommendation Form
After Review and Approval of the Data Form (Information Sheet), Administrator (Role #1) initiates a Recommendation Form
# Select Recommendation Form

[Image of a website with options for Postdoctoral Forms, highlighting the "Recommendation Form"]

## Postdoctoral Forms

<table>
<thead>
<tr>
<th>Request Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Recommendation Form</td>
</tr>
<tr>
<td>[ ] Termination Form</td>
</tr>
<tr>
<td>[ ] Change Transactions</td>
</tr>
</tbody>
</table>

[Stanford University AXESS UAT logo]
Click Add to initiate a new Recommendation Form
Adding Postdoc

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:

Supporting Documents

Save  Submit  Back  Print
Search for the Data Form by Last Name and/or First Name of the postdoc. Click on the correct one from the Search Results list.
Request Type: “Research Scholar” or “Clinical Trainee” determines the questions on the rest of this form!

Admin can start, save and return to the Form anytime!

This hyperlinks to the Information Sheet (Data Form)
Reminder: Use “Departmental Transfer” if hiring a Stanford Postdoc from another group.

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

Supporting Documents

Save  Submit  Back  Print
Click on View All to open full list of Education Details entered by the postdoc

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**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
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<tbody>
<tr>
<td>Select PostDoc Data Form</td>
<td>00791322</td>
</tr>
<tr>
<td>*Postdoctoral Request Type</td>
<td>Research</td>
</tr>
<tr>
<td>Is this request for Department Transfer?</td>
<td>No</td>
</tr>
</tbody>
</table>

**Appointee Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Rannie</td>
</tr>
<tr>
<td>First Name</td>
<td>Annie</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>12/25/1955</td>
</tr>
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</table>

**Department Applied**

<table>
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<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Dept ID</td>
<td>CHEMISTRY</td>
</tr>
<tr>
<td>*Faculty Sponsor ID</td>
<td>02758902 Jeffrey Koselleck</td>
</tr>
<tr>
<td>*Research Mentor ID</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>650/735-2363</td>
</tr>
<tr>
<td>Email Addr</td>
<td><a href="mailto:pscs-dev-emails@stanford.edu">pscs-dev-emails@stanford.edu</a></td>
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</table>

**Education Details**

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Institution</td>
<td>05030148 Georgetown University</td>
</tr>
<tr>
<td>City</td>
<td>Washington</td>
</tr>
<tr>
<td>State</td>
<td>DC</td>
</tr>
<tr>
<td>Field of Study</td>
<td>CHEMISTRY</td>
</tr>
<tr>
<td>Country</td>
<td>USA</td>
</tr>
<tr>
<td>Degree</td>
<td>SM Master of Science</td>
</tr>
<tr>
<td>Degree Date</td>
<td>08/01/2011</td>
</tr>
<tr>
<td>Start Date</td>
<td>08/01/2007</td>
</tr>
<tr>
<td>End Date</td>
<td>07/24/2011</td>
</tr>
</tbody>
</table>
Admin enters Academic Career and Appointment Information

Use in the case of lab/research center affiliation

Modifiable based on Research experience Post-doctoral degree only.

If yes, no longer need Signed Agreement for Services Outside Of Fellowship.
"Academic Career": SoM Clinical Departments enter "MED"
SoM Basic Science & All non-SoM Departments enter "GR"
The Form will indicate here the appropriate minimum total funding required (annualized) for the postdoc based on months of research experience. Total Annual Amount must meet or exceed that Required Salary.

<table>
<thead>
<tr>
<th>Funding Details</th>
<th>Annual Amount:</th>
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<tbody>
<tr>
<td>New Salary Paid through Stanford University, entered in GFS - Description</td>
<td></td>
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<tr>
<td>New Stipend / Fellowship support paid through Stanford University - Description</td>
<td></td>
</tr>
<tr>
<td>New Outside support with direct payment to fellow - Description</td>
<td></td>
</tr>
<tr>
<td>NIH</td>
<td>53000.00</td>
</tr>
</tbody>
</table>

| Department Administrator                          |                    |
| Admin: 05281677  Annelies Ransome                | Email Addr:        |
| Phone: 650/735-0129                               | pscs-dev-emails@stanford.edu |
Area of research populates the offer letter.
Form Saved

Post Doc Form Saved Successfully (25400,15)
Once Form is saved, you can Click on Offer Letter and verify it’s complete and all formatting before you submit the Form.
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
(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, if needed).

For your records, please print a copy of this letter and the additional terms and conditions governing all 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 pcsdev-emails@stanford.edu. Please visit the Office of Postdoctoral Affairs website at [http://postdocs.stanford.edu](http://postdocs.stanford.edu) (click on the "Incoming Postdocs" tab) for online orientation information which may be of guidance prior to and upon your arrival.

Sincerely,

Jeffrey Koseff
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 ...

215 characters left
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, if needed).

In your position you will also be ......

For your records, please print a copy of this letter and the additional terms and conditions governing all postdoctoral appointments at Stanford at 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 pscs-dev-emails@stanford.edu. Please visit the Office of Postdoctoral Affairs website at http://postdocs.stanford.edu (click on the "Incoming
To Retrieve a Saved Form

Postdoctoral Forms

<table>
<thead>
<tr>
<th>Request Type</th>
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<tr>
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<td>☐</td>
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<tr>
<td>Termination Form</td>
<td>☐</td>
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</tr>
<tr>
<td>Change Transactions</td>
<td>☐</td>
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<tr>
<td>Last Name</td>
<td>Rannie</td>
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<td>Academic Sub-Plan</td>
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<tr>
<td>Transaction Status</td>
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</table>

[Search] [Clear All]
View of Workflow Transaction in PS

Process: PD-REC-SHEET-PD-CITZN
Transaction ID: 00791323  Annelies Ransome has requested your on-line approv
Txn Status: Draft  Status Date/Time: 08/02/2011 4:48:54PM
Initiator: 05281677  Annelies Ransome

Originator Details
EmplID: 05281677  Ransome, Annelies Ashoff
Phone: 650/736-0129
Email: pscs-dev-emails@stanford.edu

Comments:
For postdocs who will be Independent Centers and Labs, approvers from the academic department and the center/lab must review the Recommendation Form.

Click on “+” and for “Seq” enter “15”, for “Role” enter “PD-CHAIR-PROXY-DFA”, and the appropriate approver.

- If Role #1 is in the department, add approver from the center/lab.
- If Role #1 is in the center/lab, add approver from the department.
Submit Form!

Message

PostDoc Recommendation request form submitted Successfully. (25400,94)

OK Cancel
Workflow Notification Email to Approver (Role #3):

Subject: Test message: Annelies Ranione has requested your on-line approval for a Postdoc Recommendation.

A Recommendation request for the following Postdoctoral Scholar has been submitted for your review and approval.

LAST NAME: Rannie
FIRST NAME: Annie
TRANSACTION ID: 00791323

Please log in to Axess (https://axess.stanford.edu/) and click on the "Employee Information" tab on the top bar. Then click on the "Workflow Home" link in the "Workflow" pagelet to review the request.
Workflow Interface (Role #3)
When Approvers (Role #3) opens Annie Rannie in Workflow

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

* Required field  + Must match passport

Workflow Transaction Information
WF Trans ID: 00791322  Status: Pending  Status Date & Time: 08/02/2011 4:06:15PM
Originator: PeopleSoft Administrator  Email:  Phone:

**Approval Schedule**

<table>
<thead>
<tr>
<th>Name</th>
<th>Approval Role</th>
<th>Approval Type</th>
<th>Approval Sequence</th>
<th>Transaction Action</th>
<th>Status Date &amp; Time</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Patricia Richter</td>
<td>PD-DEPT-ADMIN1</td>
<td>Approver</td>
<td>10</td>
<td>Pending</td>
<td>08/02/2011 4:06:15PM</td>
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<tr>
<td>Annielis Ransome</td>
<td>PD-DEPT-ADMIN1</td>
<td>Approver</td>
<td>10</td>
<td>Pending</td>
<td>08/02/2011 4:06:15PM</td>
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<tr>
<td>Rania Sanford</td>
<td>PD-DEPT-ADMIN1</td>
<td>Approver</td>
<td>10</td>
<td>Pending</td>
<td>08/02/2011 4:06:15PM</td>
<td></td>
</tr>
</tbody>
</table>

**Personal Details**

- **Last Name:** Rannie
- **Middle Name:**
- **Social Security Number:** 216-39-4824
- **Tax Payer ID:**
- **Birth State or Province:**
- **Sex:** Male
- **Country of Citizenship:** USA
- **First Name:** Annie
- **Other Names:**
- **Date of Birth:** 12/25/1965
- **Birth City:** San Francisco
- **Birth Country:** USA
- **Marital Status:** Married
- **Country of Residence:** USA

**Ethnicity Information**

1) Are you Hispanic or Latino?
Workflow to DFA/Dept. Manager View (Role #3) cont...
Bottom of Workflow Screen

Work Experience

Present Occupation: Researcher
Present Institution/Employer: Quantity Matters
City: Washington
State: DC
Country: USA

Primary Work Activity: Research
Start Date: 06/01/2011
End Date: 07/31/2011

Prior Experience: 2 Months
Prior Research Experience: 2 Months

Authorization Agreement
Supporting Documents

Approve  Return  Decline  Print  Back to Workflow Home
Workflow for Role #3: Approval does the next step - Sends Offer Letter to Candidate!
Role #3’s final view in Workflow

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

* Required field + Must match passport

Workflow Transaction Information

WF Trans ID: 00791322 Status: APPROVED Status Date & Time: 08/02/11 4:26:00PM
Originator: PeopleSoft Administrator Email: Phone:

Approval Schedule

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<tr>
<th>Name</th>
<th>Approval Role</th>
<th>Approver Type</th>
<th>Approval</th>
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<tbody>
<tr>
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<td>PD-DEPT-ADMIN1</td>
<td>Approver</td>
<td>10</td>
</tr>
<tr>
<td>Annelies Ransome</td>
<td>PD-DEPT-ADMIN1</td>
<td>Approver</td>
<td>10</td>
</tr>
<tr>
<td>Rania Sanford</td>
<td>PD-DEPT-ADMIN1</td>
<td>Approver</td>
<td>10</td>
</tr>
</tbody>
</table>

Message

Approval completed. Originator will be notified. (25100,165)

OK

Personal Details

Last Name: Rannie
Middle Name: 
Social Security Number: 216-39-4624
Tax Payer ID: 
Birth State or Province: 
Sex: Male Female
Country of Citizenship: USA United States

First Name: Annie
Other Names: 
Date of Birth: 12/25/1955
Birth City: San Francisco
Birth Country: USA United States
Marital Status: Married
Country of Residence: USA United States

Ethnicity Information


Workflow Status

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

* Required field  + Must match passport

Workflow Transaction Information

<table>
<thead>
<tr>
<th>WF Trans ID: 00791322</th>
<th>Status: APPROVED</th>
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<td>Originator: PeopleSoft Administrator</td>
<td>Email:</td>
<td>Phone:</td>
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Approval Schedule

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<td>Approver</td>
<td>10</td>
<td>APPROVED</td>
<td>08/02/2011 4:26:00PM</td>
<td></td>
</tr>
</tbody>
</table>

Personal Details

- **Last Name:** Rannie
- **First Name:** Annie
- **Social Security Number:** 210-39-4824
- **Date of Birth:** 12/25/1955
- **Birth City:** San Francisco
- **Birth Country:** USA
- **Marital Status:** Married
- **Country of Citizenship:** USA
- **Country of Residence:** USA

Ethnicity Information

1) Are you Hispanic or Latino?  
   - Yes, I am Hispanic or Latino

Back to Workflow Home
When Rec Form is approved by the DFA/Department Manager (Role #3), an email notification goes to Postdoc asking him/her to return to the Secure Portal to review and accept/decline the offer.

Subject: Test message: Recommendation Sheet with transaction ID #00791323

Dear Annie Rannie,

Chemistry has completed its preparation of your postdoctoral appointment paperwork at Stanford University. You must now go online to http://secureportal.stanford.edu in order to review the terms and conditions of your offer. Your online acceptance is required for the completed paperwork to be submitted to the university for final review and approval.

Please do not hesitate to contact me at pscs-dev-emails@stanford.edu if you have any questions or concerns about your offer of appointment.

Best wishes,
Annelies Ransome.
Offer Letter Language is sent by email to the faculty sponsor and research mentor. No action necessary.

Subject: Test message: Recommendation Request with transaction 00791323 for Annie, Rannie has been Submitted.

Dear Professor Jeffrey Koseff,

This is a notification that Annelles Ransome has submitted a recommendation on your behalf to appoint Annie Rannie as a postdoctoral scholar in Chemistry. Upon approval by the Department, your prospective postdoc will receive an offer letter electronically to document your agreement and university policy regarding postdoctoral scholars, and it will include the information you provided for this appointment as follows:

During this appointment, Annie Rannie will be involved in the exciting world of chemical reactions. The initial appointment will begin on August 2, 2012, and end on August 31, 2012. The total support for the initial year of training will be $3,000, plus certain medical, dental, vision and life insurance coverage through Stanford’s Postdoctoral Scholar programs. This 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 postdoc’s part. Effective on October 1 of each year, the 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 this initial appointment and subject to the term limits set forth in Research Policy Handbook 9.4 and the Postdoc Handbook, this appointment may be eligible for renewal, based on satisfactory performance, the existence of funding, and programmatic need.

The source of funding will be NIH. At this time or during the term of this appointment, if the postdoc will receive other funding to support the training at Stanford, the postdoc is required to provide a copy of the funding letter to the Office of Postdoctoral Affairs and to you. Receiving external support towards postdoctoral training at Stanford may alter the amount of funding offered to the postdoc from Stanford or other sources, or the responsibilities associated with this appointment.

Postdoctoral Scholars are required to attend a mandatory Postdoctoral Benefits Session upon their arrival at Stanford. The Benefits Session is held at 1215 Welch Road, Modular A, Conference Room 62 every Thursday from 10:00 a.m. to 12:00 p.m. Annelles Ransome will enroll your postdoc prior to the start of the appointment.

Stanford provides a range of health and other benefits to all postdoctoral scholars. Postdocs will have a choice between two medical plan options (HMO or PPO) plus dental, vision, disability and life insurance coverage. In order to secure health care coverage through the Stanford plans, the postdoc must enroll within the first 31 days of the appointment start date. Postdocs who are paid a “salary” by Stanford may save for your retirement by contributing to Stanford’s Tax Deferred Annuity Plan. Postdoc benefits information and policy is available at http://postdocs.stanford.edu/benefits/.

All Postdoctoral Scholars at Stanford are eligible for leave benefits as follows: vacation of one day paid per calendar month of appointment (in addition to official University holidays); sick leave of 15 calendar days of absence due to illness per year; and paid maternity leave of up to six weeks. In addition, your postdoc may be eligible for family and medical leave. Please refer to the Research Policy Handbook 9.4 and the Postdoc Handbook for more details. Any leave policy must be acceptable to outside funding agencies.

At Stanford, Postdoctoral Scholars are considered students in advanced training and must be registered and receive at least the University’s required minimum funding appropriate to them every academic quarter in order to receive privileges such as email, access to the libraries and athletic facilities.

The final approval of this appointment is contingent upon the postdoc providing any missing required documents, including evidence of completion of a doctoral degree program. If the final degree has not yet been conferred, a statement of completion of studies from a home institution official (Registrar’s Office or equivalent) is required before the appointment may start. This statement should indicate the date on which all requirements were completed and the expected date of degree conferral.

In your position you will also be ......

Please save a copy of this email for your records. The same information is included in the offer letter that will be available electronically to the postdoc for online acceptance before this appointment recommendation proceeds to the Office of Postdoctoral Affairs (OPA). Feel free to ask Annelles
While you are waiting for the postdoc to accept the offer letter, you will be able to see the “send to OPA” step in your WorkFlow queue but the “approve” button will be disabled – the system is waiting for the postdoc to approve the offer letter, which is done outside of Workflow.
New Appointment: Postdoc Reviews Offer Letter
Postdoc Returns to the Secure Portal...

Welcome!

The Gateway to Stanford is a secure Portal where individuals in the early stages of joining the Stanford community may their association with the University.

The site currently provides application forms for the following:

**International students and job applicants:**

Use this site to initiate Employment Visa requests.

**Postdoctoral scholars:**

Use this site to submit information required for processing your postdoctoral appointment.
Hyperlink to a PDF version of the Offer Letter. Postdoc must print out for record or save as PDF on his/her computer!

Postdoc must click on appropriate box to continue the process

Gives the status of the process
Postdoc Goes to View Offer Letter
PDF Pop-Up Window

File Download

Do you want to open or save this file?

Name: 1140.pdf
Type: Adobe Acrobat Document, 5.67KB
From: secureportal-uat.stanford.edu

Open  Save  Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
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 terms and conditions 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 copy of the funding letter to the Office of Postdoctoral Affairs and to me. Receiving external support has the following advantages: Stanford decreases the amount of funds offered, if any;
Accept or Reject Offer

Welcome, Annie

Postdoctoral Scholar Data Form

Transaction ID: 00791322

Transaction Status: Approved - Review Offer

View Offer Letter

Accept Offer Letter  Reject Offer Letter
Welcome, Annie

Postdoctoral Scholar Data Form

Transaction ID: 00791322

Transaction Status: Offer Letter Accepted

View Offer Letter
Test message: Offer letter has been accepted for transaction ID # 00791323.

workflow@psprcuat20.stanford.edu

Sent: Tue 8/2/2011 5:15 PM
To: postdocaffairs@stanford.edu

Dear Annie Rannie:
Thank you for accepting your offer of postdoctoral appointment at Stanford University. Your appointment paperwork and your signed offer will now be sent to the Office of Postdoctoral Affairs for final review and final signoff.

For questions regarding your appointment and upcoming transition to Stanford may be directed to your administrator at Annelies Ransome at pscs-dev-emails@stanford.edu.
Admin (Role #1) must return to Workflow to complete submission to OPA!

Test message: Offer letter has been accepted for transaction ID # 00791323.

workflow@psprcuat20.stanford.edu

Sent: Tue 8/2/2011 5:15 PM
To: postdocaffairs@stanford.edu

Annie Rannie has accepted the offer of postdoctoral appointment online. In order to submit the complete appointment paperwork, please go to http://axess.stanford.edu, go to the PeopleSoft tab, and click on the Workflow Home link and submit the transaction to the Office of Postdoctoral Affairs for final review and final university approval. OPA does not receive the paperwork until after you have completed this final submission step.
## Admin (Role #1) Workflow

### My Approvals

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<th>Rannie_Annie-PostDoc Request Type-Research 02</th>
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<tr>
<td><strong>Originated on:</strong> 08/02/11 4:32:05.000000PM</td>
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<td><strong>Originated By:</strong> Annelies Ransone</td>
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<td><strong>Acad Program:</strong> CHEM Chemistry</td>
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<td><strong>App Start Date:</strong> 08/02/2011</td>
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<td><strong>Comments:</strong></td>
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<td><strong>Comments:</strong></td>
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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.

<table>
<thead>
<tr>
<th>WF Trans ID: 00791323</th>
<th>Status: Pending</th>
<th>Status Date &amp; Time: 08/02/2011 4:57:52PM</th>
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<tbody>
<tr>
<td>Originator: Ransome, Annelies Annkoff</td>
<td>Email: <a href="mailto:pacs-dev-emails@stanford.edu">pacs-dev-emails@stanford.edu</a></td>
<td>Phone: 650/736-0129</td>
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### Approval Schedule

<table>
<thead>
<tr>
<th>Name</th>
<th>Approval Role</th>
<th>Approver Type</th>
<th>Approval Sequence</th>
<th>Transaction Action</th>
<th>Status Date &amp; Time</th>
<th>Status Date &amp; Time</th>
<th>Comments</th>
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<tbody>
<tr>
<td>1 Rania Sanford</td>
<td>PD-CHAIR-PROXY-DFA Approver</td>
<td>Approver</td>
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<td>08/02/2011 4:57:52PM</td>
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<td>2 Allistair Murray</td>
<td>PD-CHAIR-PROXY-DFA Approver</td>
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<td>3 Annelies Ransom</td>
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<tr>
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</tbody>
</table>

### Post Doc Transaction Details

- **Select PostDoc Information sheet:** 00791322
- **Postdoctoral Request Type:** PostDoc Research Scholars
- **Is this request for Department Transfer:** No
- **Comparative Display of Biographic Data:** Offer Letter
  - Complete Information Sheet

### Appointee Information

- **Last Name:** Ranie
- **First Name:** Annie
- **Middle Name:**
- **Date of Birth:**

### Department of appointment

- **Dept ID:** CHEMISTRY
- **Chemistry**
- **Facult Sponsor ID:**
- **Phone:**
- **Email add:**
Option to add note to OPA
Form Sent to OPA!
Admin may return to Workflow ANYTIME, go to “My Pending Transactions” tab and see the status of the form.

```plaintext
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

Workflow Transaction Information

WF Trans ID: 00791323
Originator: Ransome Annelies Ashoff
Email: pocs-dev-mails@stanford.edu
Phone: 650/736-0129
Status Date & Time: 08/02/11 5:23:36PM

Approval Schedule

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</table>
```
OPA Reviews and ...

Approves!

Admin and Postdoc get the following emails.

Faculty sponsors and mentors are also cc’ed.
Workflow Notification of OPA’s Approval.

From: workflow@psprcuat20.stanford.edu
To: postdocaffairs@stanford.edu
Cc: 
Subject: Test message: PostDoc Research Scholars request for Rannie, Annie has been Approved

Approved By: Shannon Monahan

00791323 has been approved by Shannon Monahan

Type of Request: PostDoc Research Scholars
Last name: Rannie
First name: Annie
Transaction Id: 00791323
Comments:
Dear Dr. Annie Rannie:

I am writing to confirm that your appointment as a postdoctoral scholar at Stanford University has been reviewed and approved for the period starting 2011-08-02 to 2012-08-31. We have completed the processing of your Postdoctoral Appointment. You may access your Stanford ID number by contacting your department administrator.

Your Online Postdoctoral Orientation:
The Office of Postdoctoral Affairs website (OPA) http://postdocs.stanford.edu/ has a section titled Incoming Scholars which contains useful information as you prepare for your arrival to Stanford. Please consult this page, particularly the relevant information under Prior to Arrival http://postdocs.stanford.edu/incoming_scholars/prior_to_arrival.html and Upon Arrival. The first page, Prior to Arrival, includes steps to obtain your SUNet ID which you will need if you wish to apply for Stanford student housing, for example. The site also includes important information on what you need to do in your first few weeks at Stanford. Please review it and follow the checklists we provide to you in order to prepare for a successful transition to our campus.

Upon your arrival, you are required to attend a Benefits Session organized by the Postdoc Benefits Group in Stanford’s Human Resources. Please ask your department administrator to enroll you in that session. Your administrator will inform you of any remaining steps with respect to your transition to your new position and if you have training or other requirements that are part of your postdoctoral appointment.
The Office of Postdoctoral Affairs welcomes you to Stanford!

Al Murray
Postdoctoral Services Manager
Office of Postdoctoral Affairs
1215 Welch Road
Modular A, Room 84
Stanford, CA 94305-5402
work: (650) 498-7618

The notice that the appointment has been approved by OPA does not mean that the appointment data has been uploaded to PeopleSoft. The approval notice gets sent the moment “approve” is hit by OPA in WorkFlow, not the moment the data is uploaded to PeopleSoft.

To check if the appointment is active in PeopleSoft, log-in and look for the ID #.
CHANGE TRANSACTION FORM

*Used for:*
- Reappointments
- Changing Faculty Sponsor
- Salary Change
- Change of Start Date
PEOPLE SOFT USAGE AGREEMENT

BY CLICKING THE LINK BELOW YOU INDICATE YOUR AGREEMENT WITH ALL OF THE FOLLOWING STATEMENTS:

* One
I understand the regulations regarding the use of all data in the PeopleSoft records.

* Two
I accept responsibility for entering and maintaining accurate data in compliance with applicable laws and University policy.

* Three
I accept responsibility for complying with the Federal law and University policy concerning the privacy rights of students, student applicants, employees, and job applicants.

* Four
I understand that a breach of this agreement can be cause for disciplinary action, up to and including termination of employment.

I agree to the above
Click on Administrative Forms Link
Click “Add” if you are starting any type of NEW Change Form.

If you already started a form and did not submit it, or you would like to find the last change form submitted for a postdoc, enter some search criteria and then click “Search.”
To Change Annie Rannie

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

Buttons:
- Search
- Add
- Clear All
Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

- □ Appointment dates change
- □ Faculty change
- □ Funding change

Bio 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: ____________________________

Appointmet End date: ____________________________

Visa/Permit Type:

Faculty Sponsor:

Faculty Mentor:

Additional Information regarding terms:

Comments:

Check the type of change you are submitting
Enter the Student ID number or click on magnifying glass and search for your postdoc
Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

- Appointment dates change
- Faculty change
- Funding change

Bio Demo

*Student ID: [blank]
*Acad Org: [CHE]

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:

Appointment Date Change

Appointment Start Date Changes

Update the below date only to indicate a modification in the start of the appointment, this to indicate an earlier start, or a deferred start, for example, due to visa delays. Do not change the appointment start date if this is an extension request and make the change only in the Appointment Start Date below. Note that you must notify Bechtel and Postdoc Benefits of changes in Start Dates.

New Appointment Start Date: [blank]
Post Doctoral Scholars Appoint
Changes

Request Type

- Appointment dates change

* Student ID:

* Acad Org:

CHE

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:

Appointment Start Date Changes

Update the below date only to indicate a modification in the start of the postdoctoral appointment in your department. Use this to indicate an earlier start, or a deferred start, for example, due to a postponement of the degree conferral dates or due to visa delays. Do not change the appointment start date if this is an extension request. Leave the default date unchanged.
The appointment Information is Displayed based on the Recommendation Form and any previous Change Forms.
Leave this date unchanged UNLESS you are noting a delayed or earlier start of a new postdoc.

Enter New End Date Here for a Reappointment:
Tab out of field to recalculate below.

If this number changes to over 60 months, STOP! You are exceeding the five year max limit for postdoc status.
Applicable Research Experience To-Date: 3 Months

New Faculty Sponsor Information

Use this section to update the Faculty Sponsor and Faculty Research Mentor information. If a research mentor was identified for this postdoc, leaving this field blank when updating the sponsor information will retain the research mentor name. If you wish to make a change to the research mentor, enter the new mentor's information below. If you are removing a research mentor and no other mentor is identified, you must now enter the faculty sponsor's name in the Mentor field in addition to keeping it as the sponsor in order to update the information in PeopleSoft.

*Faculty Sponsor: 

Faculty Research Mentor 

Comments: 

New Annual Salary / Funding

Use this section to provide the following information: indicating the October 1 funding adjustment; any increases during the year; any changes in the types of funding sources (i.e., switching support from stipend to salary and vice versa); any new information regarding fellowship support or new awards. Include in the Comments section below details of external or internal fellowship awards including the end date of award. The Effective Date below indicates the date on which the funding change takes place.
**New Annual Salary / Funding**

Use this section to provide the following information: indicating the October 1 funding adjustment; any increases during the year; any changes in the types of funding sources (i.e., switching support from stipend to salary and vice versa); any new information regarding fellowship support or new awards. Include in the Comments section below details of external or internal fellowship awards including the end date of award. The Effective Date below indicates the date on which the funding change takes place.

*New Annual Salary Eff Dates: 31

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

Amount: 

New Stipend / Fellowship support paid through Stanford University - Description

Amount: 

New Outside support with direct payment to fellow - Description

Amount: 

Total: 0.00

**Required Salary:**

Additional Information regarding terms:

Comments:
Salary that is provided is below the expected salary
Post Doc Form Saved Successfully (25400,15)

OK
You can search for a particular form you have already been working on or the status of forms using one or more Search parameters.
Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

- Appointment dates change
- Faculty change
- Funding change

Bio Demo

*Student ID: 05779467 Annie Rannie
*Acad Org: CHEMISTRY Chemistry
Academic Program: CHEM Chemistry
Academic Plan: CHEM-PD Chemistry (PD)

Appointment type: Research Scholar PD
Original Appointment Start date: 08/02/2011
Appointment End date: 08/31/2012

Post Graduate Year (PGY):

- Months of Applicable Experience Prior to this Appointment: 2
- Months of Current Appointment: 13

Salary: 53000.00

Visa/Permit Type: UN

Faculty Sponsor: Jeffrey Koseff

Appointment Date Change

Appointment Start Date Changes

Update the below date only to indicate a modification in the start of the postdoctoral appointment in your department. Use this to indicate an earlier start, or a deferred start, for example, due to a postponement of the degree conferral dates or due to visa delays. Do not change the appointment start date if this is an extension request. Leave the default date unchanged if this is an extension request and make the change only in the Appointment End Date below. Note that you must notify Bechtel and Postdoc Benefits of changes in Start Dates.

New Appointment Start Date: 08/02/2011

Extensions of Appointments

Enter the reappointment/extension end date for this postdoc here. If the New End Date is earlier of the APPOINTMENT End Date noted above, do not use this form. Instead, complete a Termination Form instead. If the appointment is ending at an earlier date than initially offered and the action is initiated by the Faculty Sponsor/Mentor, complete an Early Termination Form. If the following fields are blank, it will not impact any changes to the appointment.
Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

- Appointment dates change
- Faculty change
- Funding change

Bio Demo

*Student ID: 05779467 Annie Rannie
*Acad Org: CHEMISTRY Chemistry
Academic Program: CHEM Chemistry
Academic Plan: CHEM-PD Chemistry (PD)
Academic Sub-Plan:
Appointment type: Research Scholar PD
Original Appointment Start date: 08/02/2011 Appointment End date: 08/31/2012
Post Graduate Year (PGY):
Months of Applicable Experience Prior to this Appointment: 2
Months of Current Appointment: 13 Salary: 53000.00
Visa/Permit Type: UN Visa End date:
Faculty Sponsor: Jeffrey Koseff
Faculty Mentor:

Appointment Date Change

Appointment Start Date Changes
Update the below date only to indicate a modification in the start of the postdoctoral appointment in your department. Use this to indicate an earlier start, or a deferred start, for example, due to a postponement of the degree conferral dates or due to visa delays. Do not change the appointment start date if this is an extension request. Leave the default date unchanged if this is an extension request and make the change only in the Appointment End Date below. Note that you must notify Bechtel and Postdoc Benefits of changes in Start Dates.

New Appointment Start Date: 08/15/2011

Extensions of Appointments
Enter the reappointment/extension end date for this postdoc here. If the New End Date is earlier of the APPOINTMENT End Date noted above, do not use this form. Instead, complete a Termination Form instead. If the appointment is ending at an earlier date than initially offered and the action is initiated by the Faculty Sponsor/Mentor, complete an Early Termination notice by following the instructions at http://postdocs.stanford.edu/admin/how-to/early-term.html in addition to submitting this form.
Provide the following information: indicating the October Fellowship end date, including the types of funding sources (i.e., switching support from another source), and the postdoc's fellowship support or new awards. Include in the Funding section all information relevant to the awards, including the end date of award. The Effective Date needs to reflect the plan.

You have changed the appointment start date of this postdoc. Continue? [OK] (25400,133)
Extensions of Appointments

Enter the reappointment/extension end date for this postdoc here. If the New End Date is earlier of the APPOINTMENT End Date noted above, do not use this form. Instead, complete a Termination Form instead. If the appointment is ending at an earlier date than initially offered and the action is initiated by the Faculty Sponsor/Mentor, complete an Early Termination notice by following the instructions at http://postdocs.stanford.edu/admin/how-to/early_term.html in addition to submitting a Termination Form.

New Appointment End Date (Extensions): 08/31/2012

Total Experience with Reappointment Term Included: 15 Months

Applicable Research Experience To-Date: 3 Months

New Faculty Sponsor Information

Use this section to update the Faculty Sponsor and Faculty Research Mentor information. If a research mentor was identified for this postdoc, leaving this field blank when updating the sponsor information will retain the research mentor name. If you wish to make a change to the research mentor, enter the new mentor's information below. If you are removing a research mentor and no other mentor is identified, you must now enter the faculty sponsor's name in the Mentor field in addition to keeping it as the sponsor in order to update the information in PeopleSoft.

*Faculty Sponsor: 00020644 Rodney Beard

Faculty Research Mentor

Comments:

New Annual Salary / Funding

Use this section to provide the following information: indicating the October 1 funding adjustment; any increases during the year; any changes in the types of funding sources (i.e., switching support from stipend to salary and vice versa); any new information regarding fellowship support or new awards. Include in the Comments section below details of external or internal fellowship awards including the end date of award. The Effective Date below indicates the date on which the funding change takes place.

*New Annual Salary Eff Date: 08/15/2011

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

Amount:

New Stipend / Fellowship support paid through Stanford University - Description

Amount:

New Outside support with direct payment to fellow - Description

HHMI FELLOWSHIP

Amount: 10000.00

Required Salary:

Total: 10000.00
Use this section to provide the following information: indicating the October 1 funding adjustment; any increases during the year; any changes in the types of funding sources (i.e., switching support from stipend to salary and vice versa); any new information regarding fellowship support or new awards. Include in the Comments section below details of external or internal fellowship awards including the end date of award. The Effective Date below indicates the date on which the funding change takes place.

**New Annual Salary Eff Date:** 08/15/2011

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

**Amount:**

**New Stipend / Fellowship support paid through Stanford University - Description**

**Amount:**

**New Outside support with direct payment to fellow - Description**

**HHMI FELLOWSHIP**

**Required Salary:**

**Amount:** 10000.00

**Total:** 10000.00

**Additional Information regarding terms:**

**Comments:**
Faculty Sponsor: 00020644  Rodney Beard

Faculty Research Mentor: 

Comments: 

New Annual Salary / Funding

In this section, provide the following information: indicating the October 1 date of the new year; any changes in the types of funding sources (i.e., switching support, new information regarding fellowship support or new awards). Include in your comments any internal fellowship awards including the end date of award. The Effect Date of pending changes takes place.

New Annual Salary Eff Date: 08/15/2011

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

New Stipend / Fellowship support paid through Stanford University - Description

New Outside support with direct payment to fellow - Description

HHMI FELLOWSHIP

Required Salary:

Amount: 10000.00

Total: 10000.00

Additional Information regarding terms:

Message

Post Doc Form Saved Successfully (25400,15)

OK
PostDoc Change Request has been submitted successfully (25400,90)
# Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

## Request Type

- Appointment dates change
- Faculty change
- Funding change

## Bio Demo

<table>
<thead>
<tr>
<th><em>Student ID:</em></th>
<th>05779467</th>
<th>Annie Rannie</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Acad Org:</em></td>
<td>CHEMISTRY</td>
<td>Chemistry</td>
</tr>
<tr>
<td>Academic Program:</td>
<td>CHEM</td>
<td>Chemistry</td>
</tr>
<tr>
<td>Academic Plan:</td>
<td>CHEM-BD</td>
<td>Chemistry (BD)</td>
</tr>
</tbody>
</table>
Role #1’s Workflow
Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Workflow Transaction Information

<table>
<thead>
<tr>
<th>WF Trans ID:</th>
<th>00791329</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originator:</td>
<td>Ransome, Annelies Ashoff</td>
</tr>
<tr>
<td>Status:</td>
<td>PENDING</td>
</tr>
<tr>
<td>Email:</td>
<td><a href="mailto:pscs-dev-emails@stanford.edu">pscs-dev-emails@stanford.edu</a></td>
</tr>
<tr>
<td>Phone:</td>
<td>650/736-0129</td>
</tr>
<tr>
<td>Status Date &amp; Time:</td>
<td>08/03/11 3:28:02PM</td>
</tr>
</tbody>
</table>

Approval Schedule

<table>
<thead>
<tr>
<th>Name</th>
<th>Approval Role</th>
<th>Approver Type</th>
<th>Approval Sequence</th>
<th>Transaction Action</th>
<th>Status Date &amp; Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shannon Monahan</td>
<td>PD-OPA-ADMIN1</td>
<td>Approver</td>
<td>10</td>
<td>PENDING</td>
<td>08/03/2011 3:28:02PM</td>
</tr>
</tbody>
</table>

Request Type

- Appointment dates change
- Faculty Change
- Funding change

Bio Demo

- Student ID: 05779467 Annie Rannie
- Acad Org: CHEMISTRY Chemistry
- Academic Program: CHEM Chemistry
- Academic Plan: CHEM-PD Chemistry (PD)
- Academic Sub-Plan:
- Appointment type: Research Scholar PD
- Original Appointment Start date: 08/02/2011
- Appointment End date: 08/31/2012
- Post Graduate Year (PGY)
When You Submit a Change Form, an email notification goes out to the Administrator (Role #1) with a cc to the Faculty Sponsor/Mentor.

Test message: PostDoc Change Request for Annie Rannie with a Transaction ID: 00791329 has been submitted.
workflow@psprcuat20.stanford.edu

Sent: Wed 8/3/2011 3:30 PM
To: postdocaffairs@stanford.edu

A change request for the postdoctoral appointment in CHEMISTRY for Annie Rannie has been made by Annelies Ransome.

The change is in: - change of appointment start date: 2011-08-15, change of appointment end date: 2012-08-31, change of faculty sponsorship: - New Faculty Advisor(s) updated to Rodney Beard.

The change request is now under review by the Office of Postdoctoral Affairs in accordance with University policy. If you have any concerns or questions regarding the information submitted for review, please contact the Annelies Ransome at pscs-dev-emails@stanford.edu or the Office of Postdoctoral Affairs at postdocaffairs@stanford.edu.
Administrator is notified via Workflow of the OPA Approval

From: workflow@psprcuat20.stanford.edu
To: postdocaffairs@stanford.edu
Cc: 
Subject: Test message: Appmentdate,Fund,Factly Change request for Rannie, Annie has been Approved

Approved By: Shannon Monahan

00791329 has been approved by Shannon Monahan

Type of Request: Appmentdate,Fund,Factly Change
Last name: Rannie
First name: Annie
Transaction Id: 00791329
Comments:
When OPA approves, the following email is sent out to the postdoc and is copied to the Administrator (Role #1)

From: workflow@psprucat20.stanford.edu
To: postdocaffairs@stanford.edu
Cc
Subject: Test message: PostDoc Change Request for Annie Rannie with a Transaction ID: 00791329 has been Approved.

Dear Dr. Annie Rannie:

I am writing to confirm that the changes in the terms of your current appointment as a postdoctoral scholar at Stanford University requested by Annelies Ransome have been reviewed and approved as follows:

change of appointment start date: 2011-08-15, change of appointment end date: 2012-08-31, change of faculty sponsorship: - New Faculty Advisor(s) updated to Rodney Beard,

Please contact the Office of Postdoctoral Affairs within 7 days of the date of this notification if further changes or corrections need to be made to this request.

Best Regards,

Al Murray
Postdoctoral Services Manager
Office of Postdoctoral Affairs
1215 Welch Road
Modular A, Room 84
Stanford, CA 94305-5402
work: (650) 498-7618
TERMINATION FORM

*Used for:*
- Early Terminations
- End of Term Terminations
- Departmental Transfers
TERMINATION FORM
# Postdoctoral Forms

**Request Type**

- Recommendation Form
- **Termination Form**
- Change Transactions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Form Transaction ID</td>
<td></td>
</tr>
<tr>
<td>EmplID</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Academic Program</td>
<td></td>
</tr>
<tr>
<td>Academic Plan</td>
<td></td>
</tr>
<tr>
<td>Academic Sub-Plan</td>
<td></td>
</tr>
<tr>
<td>Transaction Status</td>
<td></td>
</tr>
</tbody>
</table>

[Add] button highlighted
POSTDOCTORAL SCHOLAR TERMINATION FORM

* Required field  + Must match passport

**Student ID:**

Student Email:
Acad Program:
Acad Sub-Plan:
Fellowship / Program:

**Dates of Appointment**

Start Date:
*New End Date:*
*Action Reason:*

**Forwarding Information**

*Address Line 1:*
*City:*
State:
*Email ID:*

**Professional Information**

*Acad Org:
Look Up *Student ID

EmplID: begins with
Last Name: begins with Rannie
First Name: begins with
Academic Program: begins with
Academic Plan: begins with
Academic Subplan: begins with

Look Up  Clear  Cancel  Basic Lookup

Search Results
View 100

<table>
<thead>
<tr>
<th>EmplID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Academic Career</th>
<th>Student Career Nbr</th>
<th>Academic Program</th>
<th>Academic Program Status</th>
<th>Academic Plan</th>
<th>Academic Subplan</th>
</tr>
</thead>
<tbody>
<tr>
<td>05779467</td>
<td>Rannie</td>
<td>Annie</td>
<td>Graduate</td>
<td>0</td>
<td>CHEM</td>
<td>Chemistry Active</td>
<td>CHEM-PD</td>
<td>Chemistry (PD)</td>
</tr>
</tbody>
</table>

1 of 1
POSTDOCTORAL SCHOLAR TERMINATION FORM

* Required field + Must match passport

**Bio Demo**

**Student ID:** 05779467

Annie Rannie

**Student Email:** @yahoo.com

**Acad Program:** CHEM Chemistry

**Acad Sub-Plan:**

**Fellowship / Program:**

**Dates of Appointment**

**Start Date:** 08/02/2011

**End Date:** 08/31/2012

**New End Date:**

**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**
Professional Information

*New Position Title: 
*Type of Position: [ ]
*New Institution or Company: 

Foreign Scholars

Visa Type: UN 
Expiration Date: 

Certificate of Training

*Certificate of Training Requested: [ ]

Comments to Approvers and OPA

Admin Information

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

I understand that:

1. This form should be completed and sent to OPA 30 days prior to termination. Any insurance charges incurred for an untimely termination are the responsibility of the department in which the Postdoctoral Fellow is terminating.

2. This form will NOT end a Postdoctoral Scholar's paylines in GFS; I will ensure that any GFS lines will end on the date noted above.

3. This form will end tuition registration fees and insurance benefits.

4. If the postdoc is an International Scholar, Bechtel International Center will be notified via email upon approval of this form by OPA.

5. If this postdoc is a Clinical Fellow, GME will be notified via email upon approval of this form by OPA.

Note: GME not notified!
Note: GME function not functional yet—must be notified by the admin.
Message

PostDoc Termination Request form submitted Successfully. (25400,100)

OK Cancel
When OPA approves, the following Workflow email is sent to the Administrator (Role #1)

Test message: Termination request for Rannie, Annie has been Approved
workflow@psprcuat20.stanford.edu
Sent: Wed 8/3/2011 4:30 PM
To: postdocaffairs@stanford.edu

Approved By: Shannon Monahan

00791330 has been approved by Shannon Monahan

Type of Request: Termination
Last name: Rannie
First name: Annie
Transaction Id: 00791330
Comments:
Test message: Termination Request

workflow@psprcuat20.stanford.edu

Sent: Wed 8/3/2011 4:30 PM
To: postdocaffairs@stanford.edu

A termination of postdoctoral appointment for Rannie, Annie, 05779467 in the Department of Chemistry has been approved by OPA. The reason for termination is Department Transfer. The termination date is 2011-12-02.

For any questions or to confirm any information, please contact Alistair Murray (alistair@stanford.edu) for postdocs in the School of Medicine or Tammy Wilson (tjwilson@stanford.edu) for postdocs in the Schools of Humanities & Sciences, Engineering, Earth Sciences and Education.

Thank you.
Office of Postdoctoral Affairs
CONFIDENTIAL INFORMATION
Confidentiality of PD Web Forms

- Information enter 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 confirmation of the change.
- Confidential funding, performance review or other sensitive information should not be entered into PD Web Forms.
REVIEWING INFORMATION IN PD WEB FORMS
PD Web Form Information Review

- Information Sheet from Postdoc
  - REMINDER: Once “approved” by role #1 admin., Information Sheet data is locked and cannot be edited by Dept/Div or OPA.
  - If any information is incorrect, you must “RETURN” to the postdoc for correction (via Workflow).
  - Use documents uploaded to the Information Sheet by invited postdoc to check data.
International Postdocs – data MUST MATCH PASSPORT, machine-readable text (alphanumeric characters)

Dual Citizenship – must use the information on the passport they will be using to enter the US

Birthdates – US format (mm/dd/yyyy)

Funding – in US$
US Postdocs – data entered in Information Sheet must match I-9 documentation, e.g., driver’s license, social security card, etc.
TIPS FOR RECOMMENDATION FORM IN PD WEB FORMS
Degree conferral can be loaded at Rec. Form
- Any other missing docs can be loaded too

Upload Here!
Admin should carefully review research experience to exclude time prior to degree conferral.

IMPORTANT REMINDERS:
- Salary is driven off of what admin enters on the recommendation sheet
- Prior research impacts the length of time they can stay at Stanford as a postdoc.
# Prior Years of Research

## Academic Information

- **Academic Career:** Graduate
- **Academic Program:** CHEM Chemistry
- **Academic Plan:** CHEM-FD Chemistry (PD)
- **Other Stanford Associations:**

## Appointment Information

- **Area of Research/Training - Position description:**
  - the exciting world of chemical reactions
- **Appointment Start Date:** 08/02/2011
- **Appointment End Date:** 08/31/2012
- **Offer Letter Date:** 08/02/2011

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

**Research Experience since last conferral date:** 2 Months

**Research Experience, noted by department:** 2 Months

**In the postdoctoral scholar has an MD, will he or she have patient contact?**

**Additional Information regarding Patient Contact:**

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

---

**Funding Details**

**254 characters left**
“Area of Research Training and Research Description” feeds to the middle of a sentence – please be sure to double check this language.

If “additional details” are added to the offer letter, please open and review the offer letter for grammatical error and consistency of text.
### Academic Information

- **Academic Career:** Graduate
- **Academic Program:** CHEM, Chemistry
- **Academic Plan:** CHEM-FD, Chemistry (PD)
- **Other Stanford Associations:**

### Appointment Information

- **Area of Research/Training - Position description:**
  - the exciting world of chemical reactions
- **Appointment Start Date:** 08/02/2011
- **Appointment End Date:** 08/31/2012

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

- **Yes**
- **No**

- If yes, list location(s): SLAC

**Research Experience since last conferral date:** 2 Months

- **Research Experience, noted by department:** 2 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**

254 characters left
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

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.

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

New Stipend / Fellowship support paid through Stanford University - Description

New Outside support with direct payment to fellow - Description

NIH

Required Salary

Department Administrator

Admin: 05281077  Annelies Ransome
Phone: 850/736-0129

Email Addr: psco-dev-emails@stanford.edu

Reporting Documents

Message

Post Doc Form Saved Successfully (25400,15)

OK

Save

Print
Once Form is saved, you can Click on Offer Letter and verify it’s complete and all formatting before you submit the Form.
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, 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 $33,000, 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
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 if needed) to:

In your position you will also be ......

For your records, please print a copy of this letter and complete the online postdoctoral appointments at Stanford at [link]

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 pscs-dev-emails@stanford.edu. Please visit the Office of Postdoctoral Affairs website at [link] (click on the "Incoming
SEARCHING FOR RECORDS IN PD WEB FORMS
To Retrieve A Record

Postdoctoral Forms

<table>
<thead>
<tr>
<th>Request Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendation Form</td>
<td></td>
</tr>
<tr>
<td>Termination Form</td>
<td></td>
</tr>
<tr>
<td>Change Transactions</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Web Form Transaction ID</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Postdoctoral Request Type</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Rannie</td>
</tr>
<tr>
<td>Academic Program</td>
<td></td>
</tr>
<tr>
<td>Academic Plan</td>
<td>PD</td>
</tr>
<tr>
<td>Academic Sub-Plan</td>
<td></td>
</tr>
<tr>
<td>Transaction Status</td>
<td></td>
</tr>
</tbody>
</table>

[Search]  [Clear All]
Pull Up All Records
OCTOBER 1ST SALARY CHANGES
October 1st Minimum Salary Increase

- All postdocs must be at the appropriate pay level based on years of research experience
  - Departments must review their postdoc salaries/stipends on an annual basis and confirm that their scholars are funded at least the minimum appropriate to them based on their cumulative years of research experience on October 1.

- Funding Guidelines and links
    - Salary Calculator online & built in to PD Web Forms
Postdocs on External, Direct-Pay Funding

- Submit copy of award letters to OPA
- 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 haven’t caused a postdoc to fall below funding minimums.
- External funding must be supplemented by department funds if below the minimum.
Postdocs on Leave of Absence

- No need to enter stipend or salary lines in GFS
- Apply the appropriate salary rate when postdoc returns from leave
- A “FLSHP Tuition” line for fall quarter must be entered to avoid the postdoc receiving a bill in error
These are done via the Change Transaction form in STF PostDocs.
October 1st Salary Change

- STF Postdoc Web Form system automatically generates emails to the Postdoc about requested change and confirmed change.

- Reappointment/Salary Change letter protocols are up to Department/Division protocol.
  - These do not need to be submitted to OPA.
LEAVE OF ABSENCE (LOA)
LOA Process Not in AXESS Yet

- Information can still be found at http://postdocs.stanford.edu/admin/how-to/leave.html
DEPARTMENTAL TRANSFERS

Helpful Tips
What is a “Departmental Transfer”?

- When a current Stanford postdoc is ending their postdoc appointment in one Stanford department/division and being hired in another Stanford department/division.
1.) Current department/division must go into PD Web Forms and chose “Termination Form” and select “Departmental Transfer” as the reason for termination.

2.) New department/division must hire the postdoc via STF Postdoc Invite and begin the Information Sheet & Recommendation Form process.
   - IMPORTANT: Postdoc cannot use their existing Stanford Email Address (@stanford.edu) for the Invite process.
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

Search  Add  Clear All
### Look Up *Action Reason*

<table>
<thead>
<tr>
<th>Action Reason Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted another position</td>
<td>PACC, Accepted another position</td>
</tr>
<tr>
<td>Department Transfer</td>
<td>PDEP, Department Transfer</td>
</tr>
<tr>
<td>Early Termination</td>
<td>PEAR, Early Termination</td>
</tr>
<tr>
<td>End of Appointment Term</td>
<td>PEND, End of Appointment Term</td>
</tr>
<tr>
<td>Personal/Family Reasons</td>
<td>PPER, Personal/Family Reasons</td>
</tr>
<tr>
<td>Quit without Notice</td>
<td>PQWN, Quit without Notice</td>
</tr>
<tr>
<td>Resignation</td>
<td>PRES, Resignation</td>
</tr>
<tr>
<td>Failure to Return from LOA</td>
<td>RRTN, Failure to Return from LOA</td>
</tr>
</tbody>
</table>
When hiring a Departmental Transfer, you must enter their personal email address (not @stanford.edu) and click “Add.”

Do *not* skip this step – cannot add email address later!
The email address entered here MUST match where postdoc received their invitation and **cannot** be an @stanford.edu email address for Departmental Transfers.
STF PostDoc -> Administrative Forms

Postdoctoral Forms

Request Type

- Recommendation Form
- Termination Form
- Change Transactions
Select “YES” for Dept. Transfer

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

Supporting Documents

Save Submit Back Print
KNOWN ISSUES

as of August 23, 2011
Known Issues:

- Currently, Firefox is the preferred browser.
- Postdocs should not upload .DOCX files.
- All text must be in alphanumeric characters only (no signs or symbols).
- Dual Citizenship not captured in Information Sheet.
- GME not notified by the system of terminations.
- Delay between documents being uploaded by Postdoc and the documents being viewable in PeopleSoft = up to one hour (refresh required).
- Language in messages being modified.
- Must enter email address on invite’s first page.
HelpSU & OPA Website
OPA Staff answer Help Tickets sent to OPA. Tickets *must* be submitted as follows to reach OPA directly:

- Request Category: "Student Services"
- Request Type: "Postdoctoral Affairs"

Please do not call Stanford Help Desk(s) to reach OPA

- OPA Staff Contact List: [http://postdocs.stanford.edu/about/contact-staff.html](http://postdocs.stanford.edu/about/contact-staff.html)
Tell us about your request

* indicates required fields.

**Request Category**
- Student Services

**Request Type**
- Postdoctoral Affairs

**Operating System**
- If applicable to your issue, please select an OS...

**Request Description**
- Hi There,
- I have a prob...

**Note:** Do not use this form to submit Restricted or Prohibited Data.

Submit Help Request
HelpSU – OPA’s View in the Online System
Tell us about your request

* Indicates required fields.

- **Request Category**: Student Services
- **Request Type**: Postdoctoral Affairs
- **Operating System**: If applicable to your issue, please select an OS...
- **Request Description**:

  PS Problem - Error Message

  Hi There,

  I have a probb

---

Note: Do not use this form to submit Restricted or Prohibited Data.

Submit Help Request
OPA Website

http://postdocs.stanford.edu/

- PeopleSoft Project Page (PD Web Forms)
  - Training Slides
  - Workflow Chart (who gets notices/emails when)
  - Link to Blog
  - Open Lab Dates
  - Known Issues
  - Special HelpSU link requesting Authority
Questions?

Thank you for coming!