PD WEBFORMS SYSTEMS

TRAINING

Annelies Ransome
Associate Director for Administration

Fall 2011
Today's Agenda

- Policy Resources & Reminders
- Roles, Authority and PeopleSoft
- New Appointments
- Change Form
- Termination
- Known Issues
- HelpSU
Agenda (Continued)

- Confidential Information
- Reviewing Information in PD Web Forms
- Tips for Recommendation Form
- Searching for Records in PD Web Forms
- Oct. 1st 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: Admin. Entry

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 be 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/Designee, and review each postdoctoral appointment in respect to department-specific policies and context.
- May not report to the appointing faculty member(s).
Role #3: Department Chair/Manager/DFA

- 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 is 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

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

New PeopleSoft users may want to:
- Attend an Open Lab. (Friday mornings, 8am to 12 noon, Annenberg Lab E307 Annenberg Ward)
- Check the list of Frequently Asked Questions.
- Learn about configuration tools in PeopleSoft.
- See online demonstrations of PeopleSoft applications.

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

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

New PeopleSoft Users: Required Training

New users must fulfill training requirements before being granted access to the PeopleSoft system. Training completion may be required to fulfill any system or policy requirements per PeopleSoft.

- All New Users must first complete the PeopleSoft Concepts & Compliance training module via Online Learner.
- 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
Initiating a Postdoctoral Appointment (in Axess)
Postdoc Invitation: click on the
Add a New Value tab

STANFORD UNIVERSITY  AXESS UAT

Menu:
- My Favorites
- STF Web Forms
- Self Service
- STARS Menu
- Training and References
- Campus Community
  - Personal Information (Student)
  - STF PostDoc
  - Post Doc Transactions
    - Administrative Forms
    - STF MUST Type of Position TBD
    - STF Post Doc Other Applications
    - STF Post Doc Minimum SUNSPub
    - STF PostDoc Information
    - STF PostDoc Transaction Status
- Stanford Utilties
- STF AX HR Center Site
- PeopleSoft
- Worklist
- Reporting Tools
- Access Links

STF PostDoc Invite

Enter any information you have and click Search. Leave fields blank for a list of all values.

- Find an Existing Value
- Add a New Value

Maximum number of rows: 10 rows up to 500

Email ID: begins with
Department: begins with
Manager ID: begins with
Faculty ID: begins with
First Name: begins with
Last Name: begins with

[Check Sensitive]

Search | Clear | Basic Search | Decompiled Search Criteria

Find an Existing Value | Add a New Value
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.
Click magnifying glass to select Faculty Sponsor and Research.

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.

<table>
<thead>
<tr>
<th>Department</th>
<th>Chemistry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair</td>
<td>John Doe</td>
</tr>
<tr>
<td>Faculty Sponsor ID</td>
<td>123456789</td>
</tr>
<tr>
<td>Phone</td>
<td>123-456-7890</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:john.doe@stanford.edu">john.doe@stanford.edu</a></td>
</tr>
</tbody>
</table>

Email to Applicant:

<table>
<thead>
<tr>
<th>Email Sent</th>
<th>Yes</th>
<th>Email Sent Out</th>
<th>No</th>
</tr>
</thead>
</table>

Provide your demographic and academic history on the form, and upload electronic copies of the following required documents:

1. Your degree(s). If you do not have a diploma, an official letter from your university verifying your completion of your degree is necessary.
2. Your current CV.
3. If you are not a US citizen, include:
   - A legible copy of your passport
Dear [Name],

[Annalise Farnoux in Chemistry at Stanford University] has initiated the process to offer you a postdoctoral appointment at Stanford. Please go to [postdoc.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.

Please review the demographic information and academic section on the form, and upload electronic copies (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 resume/CV.
3. If you are not a US citizen, include:
   - A valid visa.
   - A valid passport.

[Send Mail]

[Checklist]

1. [ ] Yes
2. [ ] No

[Date] 10/12/2011
Clicked Send Email
POSTDOC'S VIEW OF INVITATION
Dearest Resumes,

Annies Ransone in Chemistry at Stanford University has initiated the process to offer you a postdoctoral appointment at Stanford. Please go to http://careers.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 whom 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/child) 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 Annies Ransone at anees-does-emails@stanford.edu.

10/12/2011
Postdoc goes to the designated secure portal for Stanford and registers a Username and Password.
Postdoc must use the same information used in the Invitation email: same email address and first and last names throughout the process.
A message will appear confirming that a username and password have been created. Postdoc must then enter them below and click login.
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 the next section.
Underlined field labels means that more information is available. Click on the underlined label and a pop-up box appears providing more information.
Form View for Foreign Scholar

[Diagram of Form View for Foreign Scholar]

Please enter your information below. ATTENTION: FOR SOME ITEMS, INFORMATION MUST MATCH THE PERSONAL INFORMATION ON YOUR AND YOUR DEPENDENTS' PASSPORTS.

[Sections of the form include Personal Details, Education Details, Work Experience, and Travel.

- **First Name**
- **Last Name**
- **Middle Name**
- **Social Security Number**
- **Date of Birth**
- **Place of Birth**
- **Birth Country**
- **Sex**
- **Marital Status**
- **Nationality**
- **Country of Citizenship**
- **Country of Residence**
- **Visa Status**
- **Employment Status**
- **Sponsoring Institution**
- **City**
- **State**

[Checkbox] Do you have dependents accompanying you to Stanford? Yes, No

[Date Stamp] 10/12/2011
Pop-Up Additional Information

Postdoctoral Scholar Data Form

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

<table>
<thead>
<tr>
<th>Personal Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Name</strong></td>
</tr>
<tr>
<td><strong>Middle Name</strong></td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
</tr>
<tr>
<td><strong>Social Security Number</strong></td>
</tr>
<tr>
<td><strong>Tax ID</strong></td>
</tr>
<tr>
<td><strong>Birth State or Province</strong></td>
</tr>
<tr>
<td><strong>Sex</strong></td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
</tr>
<tr>
<td><strong>Present Address</strong></td>
</tr>
<tr>
<td><strong>Permanent Address</strong></td>
</tr>
</tbody>
</table>

Please upload your supporting documentation such as prior DE-2019 passport pages or a copy of your green card in the Documents section at the end of this form.

| Area Registration Number: **#** |
| **Start Date** | **End Date** |

[Diagram of data form with fields and instructions]
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

<table>
<thead>
<tr>
<th>Personal Details</th>
<th>Family/Dependent Details</th>
<th>Scholar, Postdoc, Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholar Details</td>
<td>Dependent Details</td>
<td>Scholar, Postdoc, Other</td>
</tr>
<tr>
<td>Scholar Details</td>
<td>Dependent Details</td>
<td>Scholar, Postdoc, Other</td>
</tr>
<tr>
<td>Scholar Details</td>
<td>Dependent Details</td>
<td>Scholar, Postdoc, Other</td>
</tr>
<tr>
<td>Scholar Details</td>
<td>Dependent Details</td>
<td>Scholar, Postdoc, Other</td>
</tr>
<tr>
<td>Scholar Details</td>
<td>Dependent Details</td>
<td>Scholar, Postdoc, Other</td>
</tr>
</tbody>
</table>

Include spouse, dependents and children regardless of whether they will accompany you to Stanford. Follow the "Add Dependent" process for any additional dependents.
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"

Click on Institution ID for more information

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.

[Image of the Postdoctoral Scholar Data Form]

Enter relevant work experience, include medical residencies, teaching or research appointments, postdoctoral fellowship appointments, or others.
Enter information about positions held.
If none, cancel and move on to the next section
Postdoc can edit entries

Postdoctoral Scholar Data Form

<table>
<thead>
<tr>
<th>Position</th>
<th>Organization</th>
<th>City</th>
<th>State</th>
<th>Dates</th>
<th>Start Date</th>
<th>End Date</th>
<th>Work Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>University</td>
<td>DC</td>
<td>DC</td>
<td>2011-11</td>
<td>01/01/2011</td>
<td>12/31/2011</td>
<td>Research</td>
</tr>
</tbody>
</table>

Please click "Add More Experience" to add information about additional work experience.
Document Uploads: Postdoc must provide the documents listed below.
Postdoc can see files uploaded

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

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

TO UPLOAD:
Click the "Browse" button to locate a document on your hard drive. After selecting the document, click the "Upload Document" to attach. Please be sure that each document has a meaningful file name (e.g., "YourName_YourDegree_Diploma.docx").

REMININDER: 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.

Postdoctoral Scholar Data Form

[Form fields with the highlighted section: I agree]
Confirmation that Form is submitted. Form and uploaded documents now go to the administrator for review and approval in Workflow.
Confirmation email to postdoc after submission.

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: The hiring information sheet has been submitted.

Annie Ronnie 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. A list of all identification pages of your passport, e.g., any previous visa-related documents such as I-94, DS-2019, US visa stamps on passport, OPT application or OPT extension, any previous change of status petitions.
   b. If 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-funded 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 documents 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.

Steps to do next:
After you review the completion of the information and documents provided:
1. Log in to click on Recommendation Sheet and complete the recommendation form to appoint your prospective postdoc. 2. Obtain any additional items 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.
3. For international postdocs only: Complete DS-2019 form online and submit it, or complete the I94 Visa Request form if an H1B is requested for the prospective postdoc. Download the form from the forms section under administrators at https://postdoc.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. Position the postdoc in the workflow and the status of your appointment online at <where?>

Upon acceptance of 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: Name: Annie has requested your online approval for Initial PostDoc Request

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

Last Name: Annie
First Name: Annie
Transaction ID: 00790202

Please log into Aoness (https://aoness.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)...

<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>2011-06-12 09:35:04.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
<tr>
<td>upload soap.png</td>
<td>2011-06-12 09:35:04.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
<tr>
<td>OPA Tips &amp; Tricks in Module.doc</td>
<td>2011-06-12 09:35:04.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
<tr>
<td>OPA Door Topic.doc</td>
<td>2011-06-12 09:35:04.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
<tr>
<td>TESTING.doc</td>
<td>2011-06-12 09:35:04.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
<tr>
<td>Koala.jpg</td>
<td>2011-06-12 09:35:05.0 PDT</td>
<td>View</td>
<td>Delete</td>
</tr>
</tbody>
</table>
Role #1: Reviewing PostDoc Info in Workflow

- 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

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>
Click Add to initiate a new Recommendation Form

Postdoctoral Forms

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

Create  Add  Clear All
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

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.
This is the Recommendation Form!

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

Select PostDoc Data Form: 00731322

Postdoctoral Request Type:

<table>
<thead>
<tr>
<th>Is this request for Department Transfer:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

Comparative Display of Biographic Data

Supporting Documents

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

<table>
<thead>
<tr>
<th>Select PostDoc Data Form:</th>
<th>9079*322</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Postdoctoral Request Type:</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Is this request for Department Transfer:</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Comparative Display of Biographic Data</td>
<td>Offer Letter</td>
</tr>
<tr>
<td></td>
<td>Complete Information Sheet</td>
</tr>
</tbody>
</table>

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 Scholars' appointment, benefits enrollment, visa petition requests, SEDIS database management, & other appointment processes.

<table>
<thead>
<tr>
<th>Required Field</th>
<th>Must match password</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Select Audbox Data Form:</th>
<th>07691202</th>
</tr>
</thead>
</table>

**Postdoctoral Request Type**
- [ ] New
- [x] Renewal

**Is this request for Department Transfer:**
- [ ] Yes
- [x] No

<table>
<thead>
<tr>
<th>Grant/Project ID:</th>
<th>0819441</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Letter:</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Application Information**

- **Last Name:** Randy
- **First Name:** Jerome
- **Middle Name:**
- **Date of Birth:** 12/23/1985

**Department Information**

- **Dept ID:** CHEMISTRY
- **Chemistry:**
- **Division:**
- **Department:**
- **Comment:**

**Faculty Sponsor(s):**

- **Sponsor:** [ ]

**Research Mentor(s):**

- **Mentor:** [ ]

**Advisory Committee:**

- **Advisor:**
- **Advisor:**
- **Advisor:**

**Postdoc/Trainee Information**

- **Institution ID:** 0503014A
- **Institution:** Georgetown University
- **City:** Washington
- **State:** DC
- **Country:** USA
- **Degree:** PhD
- **Major:** Chemistry
- **Degree Date:** 08/01/2011
- **Start Date:** 09/01/2012
- **End Date:** 07/01/2013

**Contact Information:**

- **Phone:** 650.725.3503
- **Email:** sanc-dev@stanford.edu

**Other Information:**

- [ ]
- [ ]

**References:**

- [ ]
- [ ]
Admin enters Academic Career and Appointment Information

* Academic Career: [Select]
* Academic Plan: [Select]
Other Stanford Affiliation:

Use in the case of lab/research center affiliation

Appointment Information

* Area of Research/Training - Position description:

* Appointment Start Date: [Date]
* Appointment End Date: [Date]

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

Research Experience since last conferal 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?

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"
Academic Plan Look-up

Look Up Academic Plan

Academic Institution: [STU NF]

Academic Plan: [Description]

Look Up | Clear | Cancel | [Other Options]

Search Results:

1. [Result 1]
2. [Result 2]
3. [Result 3]

Contact Information:

[Contact Information Details]

[Other Contact Information]

[End of Document]
Enter All Funding Information Here.
* Admin may upload any additional documents here, including those missing from the Data Form. *

<table>
<thead>
<tr>
<th>Funding Category</th>
<th>Supporter</th>
<th>Annual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Salary</td>
<td>Stanford</td>
<td></td>
</tr>
<tr>
<td>New Stipend</td>
<td>Stanford</td>
<td></td>
</tr>
<tr>
<td>NIH</td>
<td></td>
<td>53000.00</td>
</tr>
</tbody>
</table>

**Required Salary:** 0.00  **Total Annual Amount:** 53000.00

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.
Area of research populates the offer letter.

**Academic Information**

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

**Appointments & Benefits**

- **Area of Research/Training - Position Description**: The exciting world of chemical reactions

- **Appointment Start Date**: 09/02/2011
- **Offer Letter Date**: 09/02/2011
- **Appointment End Date**: 09/02/2012

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

  - **If yes, list location(s)**: SLAC

- Research Experience since last conferment 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
Once Form is saved, you can Click on Offer Letter and verify it's complete and all formatting before you submit the Form.

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

<table>
<thead>
<tr>
<th>Information Item</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select PostDoc Data Form:</strong></td>
<td>00721322</td>
</tr>
<tr>
<td><strong>Postdoctoral Request Type:</strong></td>
<td>Research</td>
</tr>
<tr>
<td><strong>Is this request for Department Transfer:</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Current/Display of Biographic Data:</strong></td>
<td>Offer Letter</td>
</tr>
<tr>
<td><strong>Complete Information Sheet:</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Associated Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Last Name:</strong></td>
<td>Rannie</td>
</tr>
<tr>
<td><strong>First Name:</strong></td>
<td>Annie</td>
</tr>
<tr>
<td><strong>Middle Name:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Date of Birth:</strong></td>
<td>12/25/1955</td>
</tr>
</tbody>
</table>
Offer Letter

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 [https://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 $35,000, plus certain medical, dental, vision and life insurance coverage through Stanford's Postdoctoral Scholar program. 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
Can add additional information here back in the form.

(Rogistrar'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/pdfsforms/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 Amelies 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 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...
Text Admin enters is added to the Offer Letter

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/pdfs/Forms/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 pcs-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>
<th>Recommendation Form</th>
<th>Termination Form</th>
<th>Change Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Form Transaction ID</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>Postdoctoral Request Type</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>First Name</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>Last Name</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>Academic Program</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>Academic Plan</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>Academic Sub-Plan</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>Transaction Status</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
<td>[Redacted]</td>
</tr>
</tbody>
</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 approval

Txn Status: Draft

Status: Draft

Save As Draft

Date/Time: 09/02/2011 4:48:54PM

Initiator: 05281677 Annelies Ransome

EmpID: 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!
Workflow Notification Email to Approver (Role #3):

Subject: [F004] This message contains all necessary information for online approval of a Poster Recommendation

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

LAST NAME: Example
FIRST NAME: Ahmin
TRANSACTION ID: 06791393

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)

<table>
<thead>
<tr>
<th>PO-INFO-SHEET</th>
<th>Rannie_Annie_PostDoc Request Type-Initial 01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction ID:</td>
<td>00781322 Pending Approval</td>
</tr>
<tr>
<td>Received on:</td>
<td>09/02/11 4:06:16.000000PM</td>
</tr>
<tr>
<td>Originated on:</td>
<td>08/02/11 4:06:16.000000PM</td>
</tr>
<tr>
<td>Originated By:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comments:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>PO-INFO-SHEET</th>
<th>renttact2004-PostDoc Request Type-Initial 01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction ID:</td>
<td>00791321 Pending Approval</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

81
When Approvers (Role #3) opens Annie Rannie in Workflow

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

* Required field + Must match passport

<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>
</tr>
</thead>
<tbody>
<tr>
<td>Pamela Ratch</td>
<td>PD-DEPT-ADMIN</td>
<td>Approver</td>
<td>10</td>
<td>Pending</td>
<td>09/02/2011 4:05:15PM</td>
<td></td>
</tr>
<tr>
<td>Annalles Rancina</td>
<td>PD-DEPT-ADMIN</td>
<td>Approver</td>
<td>10</td>
<td>Pending</td>
<td>09/02/2011 4:05:15PM</td>
<td></td>
</tr>
<tr>
<td>Rania Sanford</td>
<td>PD-DEPT-ADMIN</td>
<td>Approver</td>
<td>10</td>
<td>Approved</td>
<td>09/02/2011 4:05:15PM</td>
<td></td>
</tr>
</tbody>
</table>

*First Name: Annie
Middle Name: Rannie
Social Security Number: 219-03-4624
Date of Birth: 12/05/1966
Birth City: San Francisco
Birth Country: United States
Sex: Female
Marital Status: Married
Citizenship: United States
Country of Residence: United States
Are you Hispanic or Latino? No
Workflow to DFA/Dept. Manager View (Role #3) cont...

[Table with columns and rows containing various information such as name, position, dates, etc.]

*Institution ID: 02323451  Georgetown University
*City: Washington  *State: DC  *Country: USA
*Degree: PhD  Master of Science  *Degree Conferred: 08/2011
*Start Date of Attendance: 06/01/2010  *End Date of Attendance: 08/01/2011

*Prior Experience: 2 months
*Prior Research Experience: 6 months
Continued...

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Middle Name</th>
<th>Social Security Number</th>
<th>Date of Birth</th>
<th>Birth City</th>
<th>Birth Country</th>
<th>Citizenship</th>
<th>Country of Residence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anna</td>
<td>Randy</td>
<td></td>
<td>216-36-4824</td>
<td>2/25/1955</td>
<td>San Francisco</td>
<td>USA</td>
<td>United States</td>
<td>USA</td>
</tr>
</tbody>
</table>

1) Are you Hispanic or Latino?
- Yes, I am Hispanic or Latino
- No, I am not Hispanic or Latino

2) What is your race? Select one or more.
- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

*Email address: anneliesrando@gmail.com*
Workflow for Role #3: Approval does the next step - Sends Offer Letter to Candidate!

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

<table>
<thead>
<tr>
<th>Name</th>
<th>Appointment Role</th>
<th>Appointment Type</th>
<th>Appointment Sequence</th>
<th>Transaction Action</th>
<th>Status Date &amp; Time</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patricia Parker</td>
<td>PD-DEPT-0048175</td>
<td>Approver</td>
<td>10</td>
<td>Final Act</td>
<td>10/05/2011 12:30 PM</td>
<td></td>
</tr>
<tr>
<td>Andrew Johnson</td>
<td>PD-DEPT-0048176</td>
<td>Approver</td>
<td>10</td>
<td>Final Act</td>
<td>10/05/2011 12:30 PM</td>
<td></td>
</tr>
<tr>
<td>Frank Sanchez</td>
<td>PD-DEPT-0048178</td>
<td>Approver</td>
<td>10</td>
<td>Approved</td>
<td>10/05/2011 12:30 PM</td>
<td></td>
</tr>
</tbody>
</table>

- Last Name: Patricia
- First Name: Parker
- Social Security Number: 210-99-4554
- Date of Birth: 12/25/1989
- Birth State or Province: USA
- US Citizenship: USA
- Are you Hispanic? Yes
- Are you Native American? No

10/12/2011
Role #3's final view in Workflow
Workflow Status

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

Name: Patricia Pointer
Approval Note: PD-DEPT-ADMIN
Status: Approved
Approval Date & Time: 08/02/2011 4:26:05PM
Status Date & Time: 08/02/2011 4:26:05PM
Comments: Peer Aded

Name: Anne Lee
Approval Note: PD-DEPT-ADMIN
Status: Approved
Approval Date & Time: 08/02/2011 4:26:05PM
Status Date & Time: 08/02/2011 4:26:05PM
Comments: Peer Aded

Last Name: Pointer
First Name: Anne
Middle Name: Lee
Social Security Number: 219-39-4824
Tax Payer ID: 123-45-6789
Birth State or Province: USA
Birth Country: United States
Nationality: USA
Country of Residence: USA
Marital Status: Married
Sex: Female
Race: None
Ethnicity: None
Are you Hispanic or Latinx? Yes, I am Hispanic or Latinx

10/12/2011
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 #00798133

Dear Annie Rennie,

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 psci-dev-mails@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.

Dear Professor Jeffrey Kosoff,

This is a notification that Annalies Rancone has submitted a recommendation on your behalf to appoint Annalies 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, Annalies will be involved in the exciting world of chemical reactions. The initial appointment will begin on August 2, 2011 and end on August 31, 2012. The total support for the initial year of training will be $45,000, plus certain medical, dental, vision, and life insurance. The 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 the postdoc's part. Effective on October 1 of each year, the funding support may change in order to meet the University’s standard COLA levels of support for postdoctoral scholars in a given academic year. At the end of this initial appointment and subject to the terms stated forth in the 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 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. 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 1055 Welch Road, Nodelen 4, Conference Room 401 at 9:00 a.m. to 11:00 a.m. Annalies Rancone will enroll you 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 (PPO or HMO) 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 want to consider participating in 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 leave per calendar month of appointment (in addition to official university holidays); sick leave of 25 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 minimum funding appropriate to their academic quarter in order to receive privileges such as library 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 conferred.

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 the appointment recommendation proceeds to the Office of Postdoctoral Affairs (OPA). Feel free to ask Annalies
IMPORTANT NOTE:

- 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 individual in the early stages of joining the Stanford community may 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’s View

Welcome, Annie

Welcome

Postdoctoral Scholar Data Form

Transaction ID: 00761322

Transaction Status: Approved - Review Offer

View Offer Letter

Accept Offer Letter

Reject Offer Letter

Hyperlink to a PDF version of the Offer Letter. Postdoc must print out for record or save as PDF on his/her computer!

Gives the status of the process

Postdoc must click on appropriate box to continue the process
Postdoc Goes to View Offer Letter

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

Hello You are logged in as ANGR8

Current Section:
- Personal Details
- Previous Addresses
- Ethnicity
- Dat Funding Details
- Education Details
- Work Experience
- Documents
- Credit
Postdoc’s View of Offer Letter

August 2, 2011

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

TO: Annie Ramos
PO Box 8520
Stanford, CA, USA 94305

Dear Dr. Ramos:

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 which are specific to Postdoctoral Scholars as set forth 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 $55,000, plus certain medical, dental, vision and life insurance coverage through Stanford’s Postdoctoral Scholar program. 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 of your part. Effective on October 1 of each year of your appointment your funding support may change in order to meet the University’s salary and salary levels of support for postdoctoral scholars in a given academic year. At the end of the initial appointment and subject to the terms outlined 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...
Accept or Reject Offer

Welcome, Annie
Postdoctoral Scholar Data Form
Transaction ID: 00761322
Transaction Status: Approved - Review Offer
View Offer Letter

Accept Offer Letter  Reject Offer Letter
Postdoc Accepted Offer
Test message: Offer letter has been accepted for transaction ID # 00791323.

workflow@psprcuat20.stanford.edu
Sent: Tue 6/2/2011 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-mails@stanford.edu.
Email message to Admin noting acceptance of offer.

Admin (Role #1) **must** return to Workflow to complete submission to OPA!

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

workflow@psprouat20.stanford.edu

Sent: Tue 8/2/2011 5:15 PM

To: pascalroberts@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](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

<table>
<thead>
<tr>
<th>My Approvals</th>
<th>My Pending Requests</th>
</tr>
</thead>
</table>

### PD-REC-SHEET-PD-CITIZEN
- **Transaction ID:** 110713507
  - Pending Approval
- **Received on:** 06/02/11 4:57:52.1141928PM
- **Originated on:** 06/02/11 4:32:35.0000000PM
- **Originated By:** Anonymous Name
- **Acct Program:** E4M (Chemistry)

### PD INFO SHEET
- **Transaction ID:** 11071321
  - Pending Approval
- **Received on:** 06/02/11 3:44:56.0000000PM
- **Originated on:** 06/09/11 3:44:57.0000000PM
- **Originated By:**

### PD-INFO-SHEET
- **Transaction ID:** 11071320
  - Pending Approval
- **Received on:** 06/02/11 3:38:18.0000000PM
- **Originated on:** 06/02/11 3:29:38.0000000PM
- **Originated By:**

**App Start Date:** 06/02/2011
**Comments:**

---

10/12/2011
**Workflow Transaction Detail**

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

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

<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>
</tr>
</thead>
<tbody>
<tr>
<td>Rivka Starfud</td>
<td>Approver</td>
<td>PD-CI-AR-PROXY/CF</td>
<td>10</td>
<td>Approved</td>
<td>08/02/2020</td>
<td>4:57:52PM</td>
</tr>
<tr>
<td>Dallas Burns</td>
<td>Approver</td>
<td>PD-CI-AR-PROXY/CF</td>
<td>10</td>
<td>Approved</td>
<td>08/02/2020</td>
<td>4:57:52PM</td>
</tr>
<tr>
<td>Annie Rice</td>
<td>Approver</td>
<td>PD-LEQF-ADMIN-AP</td>
<td>30</td>
<td>Pending</td>
<td>08/09/2020</td>
<td>4:57:52PM</td>
</tr>
<tr>
<td>Shannon Houston</td>
<td>Approver</td>
<td>PD-LEQF-ADMIN-AP</td>
<td>30</td>
<td>Pending</td>
<td>08/09/2020</td>
<td>4:57:52PM</td>
</tr>
</tbody>
</table>

*Select Postdoc Information Sheet: 01011352*

*Postdoctoral Request Type: PD/LEQF*

This request for Department Position: No

Applicant Information:

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Department Information:

<table>
<thead>
<tr>
<th>Department</th>
<th>Chemistry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair</td>
<td></td>
</tr>
</tbody>
</table>

Faculty Sponsor ID: 3108007188

Phone:

Email address:

Date: 10/12/2011
## Option to add note to OPA

### Approval Comments

**Comments:**

[Button] **OK**  [Button] **Cancel Action**
Form Sent to OPA!
Admin may return to Workflow ANYTIME, go to "My Pending Transactions" tab and see the status of the form.

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 password

<table>
<thead>
<tr>
<th>Name</th>
<th>Approval Role</th>
<th>Approval Type</th>
<th>Approval Sequence</th>
<th>Approval Action</th>
<th>Status Date &amp; Time</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rama Shankar</td>
<td>PD-CH-IR-PROXY-CFA</td>
<td>Applicant</td>
<td>10</td>
<td>Approved</td>
<td>06/07/2011 08:21:01 AM</td>
<td></td>
</tr>
<tr>
<td>Alok Mishra</td>
<td>PD-CH-IR-PROXY-CFA</td>
<td>Applicant</td>
<td>10</td>
<td>Approved</td>
<td>06/07/2011 08:21:01 AM</td>
<td></td>
</tr>
<tr>
<td>Arpana Singh</td>
<td>PD-CH-IR-PROXY-CFA</td>
<td>Applicant</td>
<td>10</td>
<td>Approved</td>
<td>06/07/2011 08:21:01 AM</td>
<td></td>
</tr>
<tr>
<td>Amitabh Misra</td>
<td>PD-CH-IR-PROXY-CFA</td>
<td>Applicant</td>
<td>10</td>
<td>Approved</td>
<td>06/07/2011 08:21:01 AM</td>
<td></td>
</tr>
</tbody>
</table>

Print [Back to Your Home]
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.

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/](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](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 94305-5492
work: (650) 498-7018

Upload to PeopleSoft

- 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
# CHANGE FORM

### Connect to PeopleSoft HR/SA

**PEOPLESOFT 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.

*Agree to the above.*

### Other Applications

- ReportMart: HR/SA
- HelpSD (Online Help Request)
- Stanford Who
- Authority Manager
- Registry Administration

### University Sites

- Admin Guide, Personnel Policies
- Admin Guide, Search
- Stanford Benefits
- Faculty Handbook
- University Holidays

---

© STANFORD UNIVERSITY. ALL RIGHTS RESERVED. STANFORD, CA 94305-3083. (650) 723-2323

112
## Postdoctoral Forms

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description</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>

### Transaction Details
- **Web Form Transaction ID**: 
- **EmplID**: 
- **First Name**: 
- **Last Name**: 
- **Academic Program**: 
- **Academic Plan**: 
- **Academic Sub-Plan**: 
- **Transaction Status**: 

### Instructions
- **Add**: Click "Add" if you are starting any type of NEW Change Form.
- **Search**: 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

- Recommendation Form
- Termination Form
- Change Transactions

[Form with fields and options]

10/12/2011
Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

- Appointment dates change
- Faculty change
- Funding change

**Student ID:**

**Academic Program:**

**Academic Plan:**

**Academic Sub-Plan:**

**Appointment type:**

**Original Appointment Start date:**

**Original Appointment End date:**

**Post Graduate Year (PGY):**

**Months of Applicable Experience Prior to this Appointment:** 0

**Months of Current Appointment:** 0

**Salary:** 0.00

**Visa/Permit Type:**

**Visa End date:**

**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**

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID:</td>
<td>05779467</td>
</tr>
<tr>
<td>Academic Program:</td>
<td>CHEM Chemistry</td>
</tr>
<tr>
<td>Academic Plan:</td>
<td>CHEM-PD Chemistry</td>
</tr>
<tr>
<td>Appointment Type:</td>
<td>Research Scholar PD</td>
</tr>
<tr>
<td>Original Appointment Start Date:</td>
<td>08/03/2011</td>
</tr>
<tr>
<td>Appointment End date:</td>
<td>08/03/2012</td>
</tr>
<tr>
<td>Post Graduate Year (PGY):</td>
<td></td>
</tr>
<tr>
<td>Months of Applicable Experience Prior to this Appointment:</td>
<td>02</td>
</tr>
<tr>
<td>Months of Current Appointment:</td>
<td>13</td>
</tr>
<tr>
<td>Salary:</td>
<td>53000.00</td>
</tr>
<tr>
<td>Visa/Permit Type:</td>
<td>UN</td>
</tr>
<tr>
<td>Visa End date:</td>
<td></td>
</tr>
<tr>
<td>Faculty Sponsor:</td>
<td>Jeffrey Koseff</td>
</tr>
<tr>
<td>Faculty Mentor:</td>
<td></td>
</tr>
</tbody>
</table>

**Appointment Start Date Changes**

Update the below data 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 conferment 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: 03/02/2011

**Extensions of Appointments**

Enter the reappointment/extension end date for this postdoc here. If the New End Date is earlier than the APPOMNT 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.
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, leave 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.
Faculty Research Mentor

Comments:

**New Annual Salary / Funder(s)**

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:*

*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

Automatic Display Required Salary: ___________

Additional Information regarding terms:

Comments: ____________________________________________

Save  Submit  Back  Print  

10/12/2011
Salary that is provided is below the expected salary
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

<table>
<thead>
<tr>
<th>Request Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Appointment dates change</td>
<td>☑ Faculty change</td>
</tr>
</tbody>
</table>

**Bio Data**

<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>C-IEM</td>
<td>Chemistry</td>
</tr>
<tr>
<td>Academic Plan:</td>
<td>C-IEM-PTJ</td>
<td>Chemistry (PTJ)</td>
</tr>
<tr>
<td>Academic Sub-Plan:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment type:</td>
<td>Research Scholar PJC</td>
<td></td>
</tr>
<tr>
<td>Original Appointment Start date:</td>
<td>06/02/2011</td>
<td>Appointment End date: 06/30/2012</td>
</tr>
<tr>
<td>Post Graduate Year (PGY):</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Months of Applicable Experience Prior to this Appointment:</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Months of Current Appointment:</td>
<td>13</td>
<td>Salary: 53000.00</td>
</tr>
<tr>
<td>Visa/Permit Type:</td>
<td>UN</td>
<td></td>
</tr>
<tr>
<td>Faculty Sponsor:</td>
<td>Jeffrey Kaffel</td>
<td></td>
</tr>
<tr>
<td>Faculty Mentor:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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 confer date 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 Student and Postdoc Benefits of changes in Star Datas.

New Appointment Start Date: 06/02/2011

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
# Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

<table>
<thead>
<tr>
<th>Request Type:</th>
<th>☑ Appointment dates change</th>
<th>☑ Faculty change</th>
<th>☑ Funding change</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Field Name:</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Student ID:</td>
<td>057798407</td>
</tr>
<tr>
<td>* Acad Org:</td>
<td>CHEMISTRY</td>
</tr>
<tr>
<td>Academic Program:</td>
<td>Chemistry</td>
</tr>
<tr>
<td>Academic Plan:</td>
<td>CHEM-PU</td>
</tr>
<tr>
<td>Academic Sub-Plan:</td>
<td>Chemistry (P-U)</td>
</tr>
<tr>
<td>Appointment type:</td>
<td>Research Scholar PD</td>
</tr>
<tr>
<td>Original Appointment Start date:</td>
<td>08/02/2011</td>
</tr>
<tr>
<td>Appointment End date:</td>
<td>08/31/2012</td>
</tr>
<tr>
<td>Post Graduate Year (PGY):</td>
<td></td>
</tr>
<tr>
<td>Months of Applicable Experience Prior to this Appointment:</td>
<td>2</td>
</tr>
<tr>
<td>Months of Current Appointment:</td>
<td>12</td>
</tr>
<tr>
<td>Visa/Permit Type:</td>
<td>UN</td>
</tr>
<tr>
<td>Visa End date:</td>
<td></td>
</tr>
<tr>
<td>Faculty Sponsor:</td>
<td>Jeffrey Kostef</td>
</tr>
<tr>
<td>Faculty Mentor:</td>
<td></td>
</tr>
</tbody>
</table>

**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 conferment date 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 Date.

**New Appointment Start Date:** 03/15/2011

**Extensions of Appointments**

Enter the reappointment/extension end date for this postdoc here. If the New End Date is earlier than the APPOINTMENT End Date noted above, do not use this form; instead, complete a Termination Form. 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 to follow the instructions at http://www.ucsc.edu/administrative/earlytermination/howto. Inform your PI in addition to submitting existing forms.
**Extensions of Appointments**

Enter the reappointment/extension end date for this position. If the New End Date is earlier than 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 was initiated by the Faculty Sponsor/mentor, complete an Early Termination notice by following the instructions at http://people.stanford.edu/term.html in addition to submitting a Termination Form.

New Appointment End Date (Extension): 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 position, leaving this field blank when uploading 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: 00020044 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 Effective 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: 10000.00

Total: 10000.00
*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 [D]

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

Additional Information regarding terms:

Comments: ________________________

Comments: ________________________
Submitted

Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

<table>
<thead>
<tr>
<th>Request Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Appointment dates change</td>
</tr>
</tbody>
</table>

- Sin Demo:

<table>
<thead>
<tr>
<th>*Student ID:</th>
<th>05779467</th>
<th>Annie Rannie</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Acad Org:</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>

133
# Role #1’s Workflow

**PeopleSoft**: Employee Information  >  STARS {Training}

### My Approval | My Pending Requests

<table>
<thead>
<tr>
<th>PD-CHANGE-TRANSACT-PD</th>
<th>Annie Rannie-PostDoc Request Type-PriceChange 06</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction ID:</td>
<td>00791329 Pending Approval</td>
</tr>
<tr>
<td>Last Updated on:</td>
<td>08/03/2011 3:28:02.0000000PM</td>
</tr>
<tr>
<td>Originated on:</td>
<td>08/03/2011 2:50:30.0000000PM</td>
</tr>
<tr>
<td>Originated by:</td>
<td>Anneles Ransome</td>
</tr>
</tbody>
</table>

**Sort By:**

Notify

My Approvals  | My Pending Requests
# Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

## Workflow Transaction Information
- **WF Trans ID:** 00791329
- **Status:** PENDING
- **Status Date & Time:** 08/03/11 3:28:02PM
- **Originator:** Ransome Annelies Ashoff
- **Email:** psca-dev-emails@stanford.edu
- **Phone:** 650/736-0129

## 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>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shannon Monahan</td>
<td>PD-OPA-ADMIN1</td>
<td>Approver</td>
<td>10</td>
<td></td>
<td>08/03/2011 3:28:02PM</td>
<td>PENDING</td>
</tr>
</tbody>
</table>

## Document Type
- [ ] Appointment dates change
- [ ] Faculty Change
- [ ] Funding change

## More Details
- **Student ID:** 05779487
- **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):** 135
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@psprca120.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@psprcuat22.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@postdoc.stanford.edu
To: postdoc فرص@stanford.edu
Sent: Wed 12/12/2011 3:34
Subject: Test message: PostDoc Change Request for Annie Rennie: a Transaction ID: 0000012345 has been approved.

Dear Dr. Annie Rennie:

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 Fensome have been reviewed and approved as follows:

- Change of appointment start date: 2011-08-15
- New faculty sponsorship: Rodney Beard
- Change of appointment end date: 2012-08-31

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,

SL Murray
Postdoctoral Services Manager
Office of Postdoctoral Affairs
210 Welch Road
Musicians A, Room 84
Stanford, CA 94305-5482
work: (650) 723-9958
TERMINATION FORM

*Used for:*
- Early Terminations
- End of Term Terminations
- Departmental Transfers
<table>
<thead>
<tr>
<th><strong>POSTDOCTORAL SCHOLAR TERMINATION FORM</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Required field</strong></td>
</tr>
<tr>
<td><em>Must match passport</em></td>
</tr>
<tr>
<td><strong>Student ID:</strong></td>
</tr>
<tr>
<td>0577987</td>
</tr>
<tr>
<td><strong>Acad Org:</strong></td>
</tr>
<tr>
<td>CHEM</td>
</tr>
<tr>
<td><strong>Acad Program:</strong></td>
</tr>
<tr>
<td>CHEM-TR</td>
</tr>
<tr>
<td><strong>Acad Sub-Plan:</strong></td>
</tr>
<tr>
<td>Chemistry (PD)</td>
</tr>
<tr>
<td><strong>Student Email:</strong></td>
</tr>
<tr>
<td><a href="mailto:vale.randle@caltech.edu">vale.randle@caltech.edu</a></td>
</tr>
<tr>
<td><strong>Academic Term:</strong></td>
</tr>
<tr>
<td>Fall 2011</td>
</tr>
<tr>
<td><strong>Address Line 1:</strong></td>
</tr>
<tr>
<td>1234 Main St</td>
</tr>
<tr>
<td><strong>City:</strong></td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td><strong>State:</strong></td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td><strong>Postal Code:</strong></td>
</tr>
<tr>
<td>Postal Code</td>
</tr>
<tr>
<td><strong>Phone:</strong></td>
</tr>
<tr>
<td>Phone</td>
</tr>
<tr>
<td><strong>Visa Type:</strong></td>
</tr>
<tr>
<td>Visa Type</td>
</tr>
<tr>
<td><strong>Expiration Date:</strong></td>
</tr>
<tr>
<td>Expiration Date</td>
</tr>
<tr>
<td><strong>New Institution or Company:</strong></td>
</tr>
<tr>
<td>New Institution or Company</td>
</tr>
<tr>
<td><strong>Certificate of Training:</strong></td>
</tr>
<tr>
<td>Certificate of Training</td>
</tr>
<tr>
<td><strong>New Position Title:</strong></td>
</tr>
<tr>
<td>New Position Title</td>
</tr>
<tr>
<td><strong>Type of Position:</strong></td>
</tr>
<tr>
<td>Type of Position</td>
</tr>
<tr>
<td><strong>End Date:</strong></td>
</tr>
<tr>
<td>09/30/2012</td>
</tr>
<tr>
<td><strong>Start Date:</strong></td>
</tr>
<tr>
<td>Start Date</td>
</tr>
<tr>
<td><strong>New End Date:</strong></td>
</tr>
<tr>
<td>New End Date</td>
</tr>
<tr>
<td><strong>Action Reason:</strong></td>
</tr>
<tr>
<td>Action Reason</td>
</tr>
<tr>
<td><strong>Enter Termination Date here:</strong></td>
</tr>
<tr>
<td>Enter Termination Date here</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
</tr>
<tr>
<td>Notes</td>
</tr>
<tr>
<td><strong>Address Line 2:</strong></td>
</tr>
<tr>
<td>Address Line 2</td>
</tr>
<tr>
<td><strong>Phone:</strong></td>
</tr>
<tr>
<td>Phone</td>
</tr>
<tr>
<td><strong>Certificate of Training:</strong></td>
</tr>
<tr>
<td>Certificate of Training</td>
</tr>
<tr>
<td><strong>New Position Title:</strong></td>
</tr>
<tr>
<td>New Position Title</td>
</tr>
<tr>
<td><strong>Type of Position:</strong></td>
</tr>
<tr>
<td>Type of Position</td>
</tr>
<tr>
<td><strong>End Date:</strong></td>
</tr>
<tr>
<td>End Date</td>
</tr>
<tr>
<td><strong>Start Date:</strong></td>
</tr>
<tr>
<td>Start Date</td>
</tr>
<tr>
<td><strong>New End Date:</strong></td>
</tr>
<tr>
<td>New End Date</td>
</tr>
<tr>
<td><strong>Action Reason:</strong></td>
</tr>
<tr>
<td>Action Reason</td>
</tr>
<tr>
<td><strong>Enter Termination Date here:</strong></td>
</tr>
<tr>
<td>Enter Termination Date here</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
</tr>
<tr>
<td>Notes</td>
</tr>
</tbody>
</table>
### Lookup *Action Reason*

#### Program Action: Discontinuation

<table>
<thead>
<tr>
<th>Action Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>begins with</td>
<td></td>
</tr>
</tbody>
</table>

#### Search Results

- View 100  First 1-10 1-10 Last

<table>
<thead>
<tr>
<th>Action Reason Description</th>
<th>Action Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted another position</td>
<td>PACO</td>
<td></td>
</tr>
<tr>
<td>Department Transfer</td>
<td>PDEP</td>
<td></td>
</tr>
<tr>
<td>Early Termination</td>
<td>PEAR</td>
<td></td>
</tr>
<tr>
<td>End of Appointment Term</td>
<td>PEND</td>
<td></td>
</tr>
<tr>
<td>Personal/Family Reasons</td>
<td>PPRR</td>
<td></td>
</tr>
<tr>
<td>Quit without Notice</td>
<td>PCQW</td>
<td></td>
</tr>
<tr>
<td>Registration</td>
<td>PRSS</td>
<td></td>
</tr>
<tr>
<td>Failure to Return from LOA</td>
<td>PRTN</td>
<td></td>
</tr>
</tbody>
</table>
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!
<table>
<thead>
<tr>
<th>New Institution or Company:</th>
<th>STANFORD UNIVERSITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa Type:</td>
<td>UN</td>
</tr>
<tr>
<td>Certificate of Training:</td>
<td></td>
</tr>
<tr>
<td>Certificate of Training Requested:</td>
<td>Yes</td>
</tr>
<tr>
<td>Salutation Type:</td>
<td>PhD</td>
</tr>
<tr>
<td>Name to appear on Certificate:</td>
<td>(if different from official name)</td>
</tr>
<tr>
<td>Annie Z. Rannie</td>
<td></td>
</tr>
<tr>
<td>Comments Regarding Certificate:</td>
<td></td>
</tr>
</tbody>
</table>

Comments to Approvers and OPA:

Admin Information:

Admin: 05281677
Admin Email: pcs-dev-emails@stanford.edu
Admin Name: Annelies Ransomé
Admin Phone: 650/736-0129
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 function not functional yet—must be notified by the admin.
PostDoc Termination Request form submitted Successfully. (25400,100)
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:
The following email is sent to Postdoc Benefits and to Postdoc.

Test message: Termination Request
workflow@psprcuat20.stanford.edu

Sent: Wed 6/8/2011 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
Confidentiality of PD Web Forms

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

- 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$
Reviewing US Postdocs

- 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
Uploading Docs in Rec. Form

- Degree conferral can be loaded at Rec. Form
  - Any other missing docs can be loaded too
Years of Research

- 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 Program: CHEM

*Academic Sub-Plan: Chemistry

Other Stanford Association: 

Research Experience since last confirmed date: 2 Months
Research Experience, noted by department: 2 Months

Fix Data Here!

Additional information regarding Patient Contact:

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

254 characters left
Offer Letter in Rec. Form

- "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.
# Checking Offer Letter

**Academic Information**

<table>
<thead>
<tr>
<th>Academic Career</th>
<th>OR</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Plan</td>
<td>CHEM-FO</td>
<td>Chemistry</td>
</tr>
<tr>
<td>Academic Sub-Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Stanford Associations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Area of Research/Interest & Description:**

- the exciting world of chemical reactions

**Appointee Start Date:** 03/01/2011

**Appointee End Date:** 02/28/2012

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

If yes, list location(s): SLAC

Research Experience since last conferred degree: 2 Months

Research Experience, noted by department: 2 Months

If the postdoctoral scholar has an MD, will he/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...
Form Saved
Once Form is saved, you can Click on Offer Letter and verify it's complete and all formatting before you submit the Form.

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 Forms: 07/01/2022
*Postdoctoral Request Type:
  - Research

Is this request for Department Transfer?
  - No

Observation Display of Biographic Data

Associate Information

Last Name: Ranle  First Name: Anne  Middle Name:

Date of Birth: 12/25/1955
Draft Offer Letter: Review Mode

August 2, 2011

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

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

Dear Dr. Ramie,

I am pleased to offer you an appointment as a Postdoc 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, including those that relate specifically to postdoctoral scholars as set forth 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 annual stipend for the initial year of training will be $55,000, plus certain medical, dental, vision and life insurance coverage through Stanford's Postdoctoral Scholar program. 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 augment your postdoctoral training at Stanford, you are required to provide a...
Draft Offer Letter: Review Mode

degree has not yet been conferred, a statement of completion or 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.

In your position you will also be...

For your records, please print a copy of this letter and.

Postdoctoral appointments at Stanford at

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...
SEARCHING FOR RECORDS IN PD WEB FORMS
To Retrieve A Record

Postdoctoral Forms

Search

Clear All

© Termination Form © Change Transactions
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
October 1\textsuperscript{st} Minimum Salary Increase

- 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 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.
October 1st Minimum Salary Increase

- 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
October 1st Salary Change

These are done via the Change Transaction form in STF PostDocs.
October 1\textsuperscript{st} 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.
Departmental Transfer Steps

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</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>

Buttons: Search, Add, Clear All
**POSTDOCTORAL SCHOLAR TERMINATION FORM**

* Required field + Must match passport

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID</td>
<td>057794687</td>
</tr>
<tr>
<td>Student Email</td>
<td>[email protected]</td>
</tr>
<tr>
<td>*Acad Org.</td>
<td>CHEMISTRY</td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Academic Plan</td>
<td>CHEM-PD</td>
</tr>
<tr>
<td>Fellowship / Program</td>
<td></td>
</tr>
</tbody>
</table>

**Details of Appointment**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>06/02/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>08/31/2012</td>
</tr>
<tr>
<td>*New End Date</td>
<td></td>
</tr>
<tr>
<td>*Action Reason</td>
<td></td>
</tr>
</tbody>
</table>

**Enter Termination Date here**

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Address Line 1</td>
<td></td>
</tr>
<tr>
<td>*City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>*Postal Code</td>
<td></td>
</tr>
<tr>
<td>*Email ID</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
</tbody>
</table>

**Professional Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>*New Position Title</td>
<td></td>
</tr>
<tr>
<td>*Type of Position</td>
<td></td>
</tr>
<tr>
<td>*New Institution or Company</td>
<td></td>
</tr>
</tbody>
</table>

**Foreign Scholar**

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa Type</td>
<td>UN</td>
</tr>
<tr>
<td>Expiration Date</td>
<td></td>
</tr>
</tbody>
</table>

**Certificate of Training**
STF PostDoc Invite
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

- 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, SCVIGS database management, & other appointment processes.

Required fields Must match passport

Transaction Details

Select PostDoc Data Form: 0079:322

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
HelpSU: helpsu.stanford.edu

- 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
HelpSU – User View

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...

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

[Submit Help Request]
HelpSU – OPA's View in the Online System
User View – Using First Line as Subject Line

<table>
<thead>
<tr>
<th>HelpSU</th>
<th>Help Request Form</th>
<th>Stanford Answers</th>
<th>IT Services Metrics</th>
</tr>
</thead>
</table>

Tell us about your request
* indicates required fields.

<table>
<thead>
<tr>
<th>Request Category*</th>
<th>Student Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Type*</td>
<td>Postdoctoral Affairs</td>
</tr>
<tr>
<td>Operating System</td>
<td>If applicable to your issue, please select an OS</td>
</tr>
<tr>
<td>Request Description*</td>
<td>PC Problem – Error Message</td>
</tr>
</tbody>
</table>

Hi There,
I have a probb

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

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!