Postdoctoral Scholars:
Key Policies and Procedures

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Postdoctoral Services Manager

May 17, 2012
Agenda

• Glossary of Terms
• Your Role & Resources as Postdoctoral Administrator
• OPA Staff - Postdoctoral Services Managers
• Part I. Appointment Definitions and Procedures:
  – Definition of a Postdoctoral Scholar
  – How to Appoint a Postdoc
  – Change Transactions
  – Ending Appointments
  – Certificates, Verifications
• Part II. Salary/Stipend Policy & Procedures
• Part III. Additional Help and ReportMart1
Glossary of Frequently Used Terms Pertaining to Postdocs
Glossary of Terms Used in this Presentation

• Postdoc = Postdoctoral Scholar
• OPA = Office of Postdoctoral Affairs
• VSR = Visiting Student Researcher (not a postdoc)
• GFS = the Graduate Financial Support system
• J-1 = the J-1 Exchange Visitor type of visa
• DS-2019=Stanford-issued document which prospective postdocs take to the US embassy to obtain a J-1 visa
• EAD = Employment Authorization Document
• OPT = Optional Practical Training
• H-1B=Employment Visa (not for postdocs unless exception)
• RPH = Research Policy Handbook
• PD Web Forms = OPA’s PeopleSoft Module for appointing/reappointing/terminating Postdocs
• GME = Graduate Medical Education office
Your Role as a Postdoctoral Administrator
What Do You Do?

• You are the primary resource for policy implementation and advice to faculty and postdocs in your area(s):
  1. Initiate Appointments and monitor renewals
  2. Orient new postdocs to your area and to Stanford: Onboarding
  3. Identify training requirements for postdocs (Health & Safety, HIPPA)
  4. Make sure that postdocs are funded at the correct level
  5. Attend Quarterly Postdoctoral Administrator meetings
  6. Advocate for your postdocs by building opportunities for them to meet, network and become part of your department/unit/lab.
Your Responsibilities in Onboarding New Postdocs

• Departmental/Lab Orientation - Prepare a detailed packet for postdocs.

• Create your own checklist and onboarding procedures.
  

• Required Appointment Paperwork Checklist:
  
  [http://postdocs.stanford.edu/admin/checklist.html](http://postdocs.stanford.edu/admin/checklist.html)

• “Getting Started at Stanford” for Postdocs:
  

• Know where to go with questions: People and Offices to Support You:
  
Resources

• OPA’s Web Page (http://postdocs.stanford.edu)

  – All Procedural Information
  – Administrator Updates Blog: for all important memos, searchable archive of historical policies and memos, including meeting slides.
  – PD Web Forms Training Slides & Updates
  – Postdoctoral Benefits
Resources

• Subscribe to the following email Lists:
  • supdssworkgroup@lists.stanford.edu
and to your School-specific email list:
  • dor-postdoc-admins@lists.stanford.edu
  • humsci-postdoc-admins@lists.stanford.edu
  • ses-postdoc-admins@lists.stanford.edu
  • soe-postdoc-admins@lists.stanford.edu
  • som-postdoc-admins@lists.stanford.edu
  • suse-postdoc-admins@lists.stanford.edu
Office of Postdoctoral Affairs Staff to support you

- Alistair Murray – alistair@stanford.edu
- (650) 498-7618
- School of Medicine: postdocs/fellows
- Tammy Wilson – tjwilson@stanford.edu
- (650) 736-9915
- All other Schools: postdocs
Part I: Appointment Procedures
What is a Postdoctoral Scholar?

• Researcher at Stanford who **has received a doctoral degree:** PhD, MD, DVM, PsycD, JD...

• Is not in a graduate student status by another institution, anywhere.

• It is the responsibility of the Postdoc Administrator to know the eligibility for postdoctoral status at Stanford University before starting a postdoctoral appointment process for a faculty member.
What constitutes a Postdoctoral appointment?


“DEFINITION
A Stanford POSTDOCTORAL SCHOLAR is a non-matriculated trainee, in graduate student status, in residence at Stanford University pursuing advanced studies beyond the doctoral level in preparation for an independent career. Postdoctoral Scholars are appointed for a limited period of time and may participate on Stanford research projects and/or may be supported by external awards or fellowships. In all cases, their appointment at Stanford is for the purpose of advanced studies, research and training under the mentorship of a Stanford faculty member.”
Other types of Research Appointments

– See relevant sections of Research Policy Handbook:
  • Academic Staff- Research (AS-R) – Staff Position
    http://rph.stanford.edu/9-1.html
  • Visiting Scholars
    http://rph.stanford.edu/9-6.html
  • Visiting Student Researchers
  • Consultants
    http://rph.stanford.edu/9-5.html
Visiting Student Researcher (VSR)

- Information on Visiting Student Researchers (VSR) can be found in the Graduate Academic Policy: [http://gap.stanford.edu/2-3.html](http://gap.stanford.edu/2-3.html)
Definition of a Postdoctoral Scholar

• A trainee at Stanford pursuing **full time** advanced studies **AFTER** the doctoral degree under the sponsorship of a Stanford faculty member in preparation for an independent career.

• Should be within 3 years of the PhD or 6 years of the MD.

• Appointed for a limited period of time up to 4 years, with a possible extension up to maximum of 5 years training.

• Must be funded at a minimum funding level set by the University.

• May be funded from research grants at Stanford or by external awards or fellowships.

• Treated as advanced, non-matriculating graduate student at Stanford ($125/quarter registration fee).
What If Candidate Does Not Fit Postdoc Criteria?

- **Is s/he too advanced?** Consider a Visiting Scholar, Research Associate or Consultant appointment.
  - Contact Your Faculty Affairs Officer for Visiting Scholar
  - Contact Your Human Resources Officer for Research Associate or Consultant arrangement

- **Does s/he not *yet* hold a PhD degree?** Appoint as a Visiting Student Researcher then convert to Postdoc
  - Contact the Office of Graduate Admissions at the Office of the University Registrar for the Visiting Student Researcher (VSR) hiring process or visit [http://vpge.stanford.edu/policy/vsr.html](http://vpge.stanford.edu/policy/vsr.html)
  - VSRs do not have a minimum funding requirement at Stanford. J-1 visa rules still apply.
  - Registration fee is assessed monthly
  - Conversion to postdoc status can happen immediately upon showing proof of doctoral degree. Funding minimums then apply. No disruption in J-1 visa for foreign citizens.
Conditional Approval

- Postdoctoral Scholar is expected, with supporting documentation, to have the final degree letter or conferral prior to the appointment start date.

- OPA may grant conditional approval in order to facilitate visa processing for foreign scholars.

- If conditional approval requirements are not met by the start date of postdoctoral appointment:
  1. the postdoctoral appointment may NOT start.
  2. The candidate must be switched to a Visiting Student Researcher (VSR) or another status until proof of degree is provided.
Proof of Degree: Acceptable Documents

- **Acceptable Proof of Degree Documents:**
  - A copy of the scholar's **diploma** (English translation and original).
  - If the scholar has more than one doctoral degree, i.e., M.D. and Ph.D., the diploma pertinent to research study is necessary for admission as a postdoctoral scholar; copies of both are preferred.

- **Letters of Completion** from an **Institutional Office**: Graduate Dean, Chancellor, Registrar. Sample letters are online:
  - [Sample Thesis Acceptance (Letter 1)]
  - [Sample Degree Conferral (Letter 2)]
  Letters should state date the scholar completed ALL the requirements, including submissions and acceptances of thesis, and the date the degree is to be conferred. Stanford still needs to receive a copy of the diploma when it is available.

- Printout of **transcript** noting dissertation submission date or degree completion date (unofficial transcript OK)

- Graduates of Stanford University must submit a diploma.
Proof of Degree: Unacceptable Documents

• Letter from the *advisor* stating completion of all degree requirements cannot be used.

• Letter from the institution stating that the candidate completed all degree courses without a statement describing completion of *all requirements for the degree (e.g., dissertation submission)*.

• Institutional letters noting upcoming defense or conferral dates may warrant a review for a conditional or provisional appointments. Letters must indicate an anticipated date of conferral.
Pop Quiz #1:
Is this a Sufficient Proof of Degree?

May 15, 2009

Stanford University
Office of Postdoctoral Affairs

This letter confirms that [Name] is a full-time doctoral student in Psychology. She will defend her dissertation on June 23, 2009, at which time she will complete all requirements for the PhD degree in Psychology.

[Signature]

Professor, Psychology & Psychiatry
Behavior Analysis Program Director
Previous Example = Not Sufficient

• Issues:
  – Written by Advisor and anticipates a defense date (not a conferral date).
  – We don’t know the outcome of the defense.
  – Does not state how long after that will a degree be completed.

  **NOTE:** It can take graduate students several months, even years, to submit dissertations after the defense.

• How to Proceed?
  – Postdoc Admin should find out an expected date of completion, then, depending on the answer, consider VSR appointment or hold off on submission until after defense or after dissertation submission and obtain an institutional letter.
Pop Quiz #2:
Is this a Sufficient Proof of Degree?

June 29, 2009

Office of Postdoctoral Affairs
Stanford University School of Medicine
1215 Welch Road, Modular A
Stanford, CA 94305-5402

This letter certifies that Jennifer Ming has completed all requirements for the Ph.D. degree in Psychology, including all necessary coursework, exams, and defense of her dissertation, effective June 29, 2009. Updating of Dr. Ming's official records in the registrar's office will be delayed until receipt of the dissertation document is transmitted from the graduate school to the registrar but will reflect this date as her official date of completion, with degree to be conferred at the next regularly scheduled university commencement (Summer term).

Sincerely,

[Signature]

Dana L. Farrow, Ph.D.
Professor, Psychology & Psychiatry
Director, Behavior Analysis Program
(Chair, dissertation committee)
Previous Example = Sufficient Conditional Approval of Appointment

• Acceptable because:
  – It states an expected conferral date;
  – Letter provided by the Office of the Registrar

• Why Conditional?
  – Dissertation is not formally accepted by Registrar

• How to Proceed?
  – Go ahead with the postdoctoral appointment. Obtain final letter as soon as it is available.
  – Because the individual is considered a graduate student at UF, VSR is the alternative if final letter is not available by the postdoctoral appointment start date.
THE GRADUATE SCHOOL - UNIVERSITY OF FLORIDA
REPORT ON THESIS OR DISSERTATION AND/OR FINAL EXAMINATION

To the Dean of the Graduate School:

UFID: 3

has submitted, in partial fulfillment of the requirements for the degree of
Doctor of Philosophy in the College of Liberal Arts and Sciences

a dissertation Entitled:

This has been examined by all members of the candidate's supervisory committee and has been

Approved: [ ]  Rejected: [ ]  Not Applicable: [ ]

Date: 6/12/2009 8:20:50 AM

RECEIVED
JUL 17 2009
Example #3 of degree-related letters and documents – Part B

The committee has examined the candidate on 06/29/2009 (date) in accordance with the regulations governing the Final Examination and has adjudged his/her performance

Satisfactory: ☑
Unsatisfactory: ☐

Exceptions or qualifications are noted as follows: No exceptions or qualifications noted

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<th>Name</th>
<th>Department</th>
<th>Required Approvals</th>
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* All members of the Supervisory Committee, including the external member, must be members of the Graduate Faculty and must be present for the final doctoral or master's examination and sign this form. The original, printed version of this form with all signatures must be retained at the Department level. Data from the completed form must be submitted electronically via GIMS to the UF Graduate School.
Previous Example = Sufficient Conditional Approval of Appointment

• Acceptable because:
  – Defended successfully

• Why Conditional?
  – Dissertation is not formally accepted by the Institution

• How to Proceed?
  – Go ahead with the Appointment. Obtain final letter as soon as it is available.
  – Because the individual is considered a graduate student at UF, VSR is the alternative if final letter is not available by the start date.
Exceptions

• For appointments that fall under any of the following categories:
  – Term is more than three years – strongly discouraged.
  – Term is less than 9 months for a Stanford PhD who is bridging time to a new position: this exception is typically granted.
  – Term extends into a fifth year requires the review of the postdoc’s CV, letter of rationale from the faculty member and a mentoring plan: granted with submission of documentation of support.
  – Appointment is joint with a Clinical Instructor appointment (90/10 or 80/20 split)
  – PhD conferred more than 3 years ago AND no postdoctoral research since PhD.

• In the above cases, you should:

  1. In Workflow Comments indicate on the Recommendation Form Approval that this is an exception, giving a brief description
  2. upload the appropriate PI rationale for the exception, as a supporting document and the mentoring plan to the Recommendation form before submission
Other Unusual Cases

• Cases that require case-by-case review and pre-approval by OPA:
  – Appointment that is joint with another institution.
  – Appointment where responsibilities (some or all) are carried out outside of Stanford.
  – MD was conferred more than 6 years ago

• And cases that go to a Faculty Subcommittee for Review include:
  - PhD conferred more than 3 years ago AND candidate was doing research after the PhD
  - Appointments for individuals who have 5 years of postdoctoral research
Starting a Postdoc Appointment

For Job Aids on Postdoc Web Forms:

http://postdocs.stanford.edu/admin/how-to/job_aids.html
How to Start a Postdoc Appointment?

1. Complete Policies and Procedures and PD Web Forms
   Training: Administrator must be authorized to appoint postdoctoral scholars for your department by the Office of Postdoctoral Affairs
   - Authorization obtained upon completion of PD Web Forms and Policies and Procedures training.
   - PeopleSoft “Concepts & Compliance” Course (online) required to work in PeopleSoft at Stanford: https://www.stanford.edu/dept/as/sandhr/learnps/index.html

2. Collect information from the sponsoring faculty:
   - Non-Stanford Email address of the postdoc to initiate the appointment (e.g., @gmail.com, @yahoo.com, etc.)
   - Appointment start and end dates, funding amounts and sources and any other special terms and conditions of appointment for submission
What to do next?

3. Start the appointment workflow processing, and review and check that all supporting documents are acceptable and uploaded in PS PD Web Forms.

4. If International Postdoc, start the DS-2019 form online too.

5. OPA Approvals will be given within 5 business days provided Workflow submissions are complete.
Visa Types for Foreign Postdocs

• The start and end dates of the visa requests must coincide with the start and end dates of the postdoctoral appointment.

• Postdocs who are current graduate students in the US may start their postdoctoral appointment on F-1 Optional Practical Training for the period of the EAD authorization (can be up to one year).

• Must be followed by a foreign scholar visa (J1) or in exceptions (H1B)
  – J-1 Scholar – up to a maximum of 5 years
  – H1B (rare) – up to a maximum of 6 years
Submission of J-1 Visa Requests

• Administrator must complete J-1 SEVIS Visa Webform Request (DS-2019) in Axess after reviewing the application process steps on Bechtel web site: http://icenter.stanford.edu/depts/j_status.html

• Submit DS-2019 requests at least 8 weeks before expected arrival date, 3 months is preferred

• Support/funding is required to cover duration of visa and appointment

• Recommendation Form to appoint Postdoctoral Scholar must accompany DS-2019 request. OPA CANNOT approve any visa program request without an accompanying postdoctoral appointment.
Determining Required Minimum Funding

- Recommendation Form and Change Form will calculate the appropriate minimum funding required for a postdoc at the time of appointment or reappointment, based upon the individual’s prior research experience.

- If you need to find out what the amount might be before starting the online process, use the Postdoc Salary Calculator on the OPA website: [http://postdocs.stanford.edu/handbook/salary.html](http://postdocs.stanford.edu/handbook/salary.html)
Reappointments

• Use the Change Transaction form in PD Web Forms to extend appointment end date

• See PD Web Forms Training slides for step-by-step instructions: http://postdocs.stanford.edu/admin/PeopleSoft_Project.html
Reappointments (beyond 4 year term limit)

• Extension of a postdoctoral appointment into a 5\textsuperscript{th} year of training requires the filing of a well-worked out written plan that has been discussed and agreed upon by the postdoc and faculty mentor(s).

• A template is available at http://postdocs.stanford.edu/faculty_mentors/PDF/Meeting_Template_Form.pdf

• Change Request must also be submitted at the same time
How to End Appointments Successfully

Transfers, Change of Status and Terminations
Reasons why Appointments End

• Early Termination
• End-of-term Termination
• Transfers to Another Department as Postdoc
• Termination actions and PS, GFS and Tuition
• Termination of Postdocs who also hold other academic appointments at School of Medicine (ie, Instructors)
• Moving into Faculty Position at Stanford
• Moving into Academic Staff (such as Research Associate) Position at Stanford
• Resignation
• Other reasons, eg., did not return from leave.
Early Termination Guidelines

- Principal Investigators should contact the Assistant Dean for Postdoctoral Affairs if there is potential of an early termination action.

- Early Termination process applies when the action is initiated by the faculty to end the appointment before its current end date.

- Early termination reasons that are mentioned in the postdoc contract:
  - Programmatic Changes, Lack of Funding, or Documented insufficient academic or research progress

- Written notice of early termination should be given at least 30 to 60 days prior to the termination date.

- If the postdoc is on a visa, the department administrator must provide a written/e-mail notice of the early termination date to the Bechtel International Center after the Office of Postdoctoral Affairs has been notified.
Early Terminations Due to Lack of Progress (i.e., performance issues)

Must follow a process by which:

1. progress discussions and written evaluation by the faculty PI are made.
2. Clear articulation (preferably written) of the specific steps to be taken in order to remedy any deficiencies, including the possibility of early termination if those deficiencies remain by a specific date.
3. Such process takes place several weeks/months in advance of taking this early termination action.

- The language in the Early Termination Notice must follow the standard template on the OPA web site:
  
  http://postdocs.stanford.edu/admin/Sample_Notice_of_Early_Termination.htm
Early Termination of International Scholars

• Bechtel International Center is under regulatory requirement to provide early termination notice of Postdoc status to the State Department (more than 30 days before visa expiration)

• Department administrator must send email advising Bechtel of early termination of any foreign scholar to foreign.scholars@stanford.edu and include the following information:
  – Postdoc name
  – Termination date
  – SEVIS number

• Administrators must follow the specific additional requirements for H1B holders: http://icenter.stanford.edu/depts/h_early_termination.html
Terminations, other than Early!

- Termination form should be received by OPA 30 days prior to termination date.
- The form will end registration fees, tuition, and insurance benefits on the end date.
- The form will NOT end a Postdoctoral Scholar's pay lines in GFS. When you end the pay lines, PLEASE remember to recalculate tuition for future terms, otherwise Unapplied Aid will be generated.
- Any insurance charges incurred for an untimely termination are the responsibility of the department in which the Postdoc is terminating.
- Termination Form does not notify GME or end visa with Bechtel.
Termination of Postdoc:
“*If Concurrent Clinical Instructor Appointment*”

The department’s Faculty Affairs Administrator must notify the School of Medicine Office of Academic Affairs when Postdoc leaves Stanford and provide the reason for the Postdoc’s departure (e.g., resignation, appointment ending, involuntary termination.)
Postdoc Terminated/Hired to Another Type of Employment at Stanford

• Faculty Appointments: please work closely with your department’s Faculty Affairs staff member.

• Academic Staff – Researcher: please work closely with your department’s Human Resources staff.
Certificates of Completion

- A Certificate of training experience may be requested on the Termination Form—indicate the highest degree completed.

- Certificates are now produced on a quarterly basis
  - February (for terminations between Oct-Dec)
  - May (for terminations between Jan-Mar)
  - July (for terminations between Apr-Jun)
  - November (for terminations between Jul-Sept)

- Administrators are notified by email when the certificate is ready for pick-up or to have them sent via ID mail

- Administrators then acquire signatures from the appropriate faculty members and mail the certificate directly to the Postdoc
Certificate Documentation

• Certificates can only document the Department, and in some cases the Division

• Subspecialty fellowships can only be listed for the very few cases of “super-fellows” with ACGME accredited training (Advanced Training)

• Clinical fellow classifications must be confirmed with Full Patient Care noted on the Recommendation Form for Clinical Trainees

• Postdoc certificates can only document the period of time for which a postdoc was directly appointed through OPA and not through GME
Verifications

- Requests for verification of a Postdoctoral training experience can be verified through our office only for the time that the Postdoc was appointed through Office of Postdoctoral Affairs.

- Verification of training through the hospital must be done by the GME office directly or by the department itself.
Certificates & Verifications

• Questions?
Postdoctoral Benefits Session

- Benefits session is mandatory for all new Postdoctoral Scholars and Clinical Fellows

- Orientation is held every other Thursday between 10:00am and 11:30am in Redwood Hall G19 in Jordan Quad, 243 Panama Street.

- Postdoctoral Scholars should be registered by the department administrator for the first session directly following their arrival at Stanford.

- Go to [http://postdocs.stanford.edu/benefits/location_orientation.html](http://postdocs.stanford.edu/benefits/location_orientation.html) to register postdoctoral scholars for the session and for a map of the location. Email postdocbenefits@stanford.edu with any questions

- Benefits enrollment will not be approved unless postdoctoral scholar has attended session

- Deadline for benefits session sign-up is Tuesday at 5:00pm for that Thursday’s orientation
Part II. Stipend/Salary

Policy and Procedures
Processing Support for Postdoc: Who does What?

• OPA’s responsibilities:
  – Term Activation in PeopleSoft Student Administration
  – Creating Student ID
  – Setting up a record in ClearBenefits

• Department responsibilities:
  – ClearBenefits entry of PTAs to charge insurance premiums
  – Aid-Year Activation in GFS; Item-Type Requests for New PTAs
  – Entry of GFS Salary, Stipend and Information-Only lines
  – Collection of I-9 documents and forwarding to Payroll (and follow-up with postdocs on missing I-9 documentation)
Paying Postdoctoral Scholars

• After Aid Year Activation, pay lines can be entered in GFS using Aid Entry

• Postdoctoral Scholars Funding
  – Either Salary or Stipend or a combination of both or external funding.
  – Must be supported either by Stanford grants and contracts, training grants, School or departmental fellowship funds, or external fellowships, or by a combination of these sources (administered in GFS).

• Assist Salary Tab
  – Use Assist Type RAF if 20 hours or more salary
  – Use Assist Type RAFC if less than 20 hours salary
  – Use Assist Type RAF on each PTA if PTAs are <20 hours but total hours salary >=20. So 10 PTAs each paying 4 hours salary would all be Assist Type RAF

• FLSHP Stipend Tab
  – use if paying stipend
  – use if paid on outside support (enter as an Information Only line)
KEY DISTINCTIONS

**SALARY**
- **ALLOWABLE** cost on research grants/contracts
- Subject to rules about employment, tax withholding
- Fringe Benefits Rate (22.5% in FY11 for 50% FTE or more appointment)
- No direct charge of insurance to dept

**STIPEND**
- **NOT ALLOWED** on research grants/contracts, except Training Grants, Fellowships
- Not employment
- Not permitted for postdocs on H-1 (employment) visas
- Insurance premiums charged at cost to department PTA or institutional allowance

Having to change from one to the other can be very painful.
Always try to get it right the first time.
See [http://gfs.stanford.edu/pd_indicators.html](http://gfs.stanford.edu/pd_indicators.html)
Fringe Benefits Rates Assessed on Salary

- Postdoc Fringe Benefit Rate (22.5%) is assessed on all salary on RAF lines (50% FTE or more)
  - e.g. two separate salary lines, each 30% FTE, will each be charged the full benefits rate

- Contingent Benefit Rate (7.9%) is assessed on Contingent lines, RAFC (less than 50% FTE)
  - e.g. one salary line for 30% FTE will be charged the contingent benefits rate

The Charge Priority - RAF or RAFC - controls the benefit rate.
If Postdoc Funding is External -> Paid Directly to Postdoc

- Enter the Funding Information in the FLSP STIPEND Tab as INFO ONLY line:
  - postdoc is funded by an outside source, and
  - the money is NOT being processed through Stanford
  - Required in order to document the funding and comply with minimum support levels.
Paying Postdoctoral Tuition

• A Registration fee of $125 is charged per term

• Postdoc Admin must Calc Tal and Route the TAL line in the Assist TAL Tab—use if paid salary

• Postdoc Admin must enter the $125 and the PTA to pay it in the FLSHP Tuition Tab—use if paid stipend or by outside support

• Postdocs in degree programs must complete a Tuition Agreement form and submit it to the Office of the Registrar in order to be assessed the correct rates per quarter.
Tips for Tuition Allowance

• Always recalculate the TAL when changing a salary aid line

• Only use TAL Overrides when absolutely necessary
  – Recalculate instead of adjusting the amount
  – When you do override amount, be sure to tab twice, and visually check before clicking OK

• Finish all entries before completing TAL lines
Postdoctoral Scholars: Advances/Reimbursements

• If you are unsure whether the payment should be categorized as reimbursable university business or as student support:

  – Submit HelpSU ticket.
    • Request Category = "Central Office Issues"
    • Request Type = "Customer Outreach for Disbursements."

8/6/2012
Postdoctoral Scholars: Advances/Reimbursements

• Travel Expenses: conferences, field trips, research collaborations etc.
  – 57841 – new expenditure type in GFS to use for Postdoc/Non-Matric Supply/Travel Stipend (postdoc travel that does not meet the criteria for University travel and cannot be processed through Oracle iOU)

• Education-related Expenses
  – Processed in GFS as student support, tax-reportable. Paid as a one-time stipend, either in advance or as reimbursement. May be tax-deductible expenses.
PeopleSoft GFS Help

• Submitting HelpSU Tickets
  – Request Category = Administrative Applications
  – Request Type = PeopleSoft GFS
  – Include the Emplid, Name, and Aid Sequence

• PeopleSoft Learning Center
  – http://peoplesoft.stanford.edu/learningcenter
PeopleSoft GFS and Postdoc Web Forms Open Lab Help

• In-Person GFS Help - Friday Open Labs
  Users who would like personalized help with their GFS questions, or who would like to go through the online training in a lab setting with a knowledgeable user on hand, are encouraged to attend a drop-in lab:

  Days:    Every Friday morning
  Time:    9:00 - Noon
  Where:   Arguello Labs, 427 Arguello Way

• Postdoc Web Forms Open Lab Help
  Days:    1\textsuperscript{st} Friday of every month
  Time:    9:00 – Noon
  Where:   Arguello Labs, 427 Arguello Way
ReportMart Reminders

• ReportMart1 GFS reports access
  – Access to reports is based on your PeopleSoft security access
  – If you have at least GFS Inquire role in PS, you have access to associated GFS reports in RM1

• Submitting HelpSU Tickets
  – Request Category = Administrative Applications
  – Request Type = ReportMart
  – Include Report Title and Report Number in ticket
  – Include Macintosh or PC user
Useful Postdoc ReportMart1 Reports

- **PS_GFS030 Monthly Postdoc Stipend Report**
  - Process this report by month end date (for the desired pay period) and emplid, plan, account, or dept/school. Displays amount issued, check number, account, etc. Only includes Active postdocs.

- **PS_GFS013 Postdoc 50% Salary Report**
  - Processes all postdocs at once. Displays postdocs who have employment of 50% or greater by month.

- **PS_GFS015 GFS Unapplied Aid Report**
  - The GFS Unapplied Aid Report provides information about students who have received financial support in GFS in excess of charges. The unapplied aid needs to be revised or removed.

- **PS_GFS020 Postdoc Paylevels Report**
  - Process by plan or dept/school, student status, and aid year. Provides GFS aid information for postdocs, including INFO ONLY lines. All postdocs included regardless of aid status.
Questions

Salary Entry/Policy or Others?
Postdoctoral Administrators Quarterly Meetings in 2012

• July 26th, 10:00 AM -11:30 AM
• October 25th, 10:00 AM -11:30 AM

Locations TBD
Open Forum

Questions?

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AskJane.stanford.edu
HelpSU.stanford.edu

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