



POSTDOCTORAL POLICY AND WEB FORMS TRAINING FOR ADMINISTRATORS

October 2022

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POSTDOCTORAL SCHOLAR

Definition and Common Acronyms



WHAT IS A POSTDOCTORAL SCHOLAR?

- Definition from Research Policy Handbook, Chapter 10.3
 - “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.**”
- A researcher at Stanford who has received a doctoral degree:
 - **PhD, MD, PhD/MD, DVM, PsyD, JD**
- A non-matriculated, non-degree seeking student
- **Is NOT in graduate student, postdoc, or employment status with another institution, anywhere else**
- The Postdoc Administrator is responsible for knowing postdoctoral eligibility before starting a postdoctoral appointment

<https://postdocs.stanford.edu/policy>

COMMON POSTDOC ACRONYMS

- **OPA:** Office of Postdoctoral Affairs
- **Postdoc:** Postdoctoral Scholar, Postdoctoral Fellow, Research Scholar (used interchangeably)
- **VSR:** Visiting Student Researcher (NOT a Postdoc; appointed by Registrar's Office)
- **GFS:** Graduate Financial Support (system used to pay Postdocs)
- **J-1:** J-1 Scholar Exchange Visitor Visa (expected visa status for international scholars)
 - **DS-2019:** Stanford-issued document; Postdoc takes to US embassy to get J-1 visa
- **OPT:** Optional Practical Training (training period for postdocs on F-1 visa)
 - **EAD:** Employment Authorization Document (EAD card for F1 OPT, also J-2, H-4, advance parole)
- **H-1B:** Employment Visa (requires policy exception approval)
- **RPH:** Research Policy Handbook (university policy resource)
- **GME:** Graduate Medical Education office (School of Medicine only)

POSTDOCTORAL ADMINISTRATORS

Responsibilities and Resources



POSTDOC ADMIN: RESPONSIBILITIES

- **Primary resource for policy implementation and guidance to Faculty and Postdocs in your department:**
 - **Initiate appointments**, monitor extensions, monitor funding, and initiate terminations
 - **Orient new Postdocs** to Stanford and department/lab:
 - *Pre-arrival communication, arrival meeting, onboarding, and ongoing resource*
 - **Enroll Postdoc** in mandatory Postdoc Benefits Orientation
 - **Identify training requirements** for Postdocs, monitor compliance
 - **Ensure** Postdocs have current appointments and are correctly funded
 - **Advise Faculty** on all policy-related matters (appointment term limits, visa restrictions, etc.)
 - **Prepare necessary web forms** and documentation for OPA review and approval
 - **Maintain** complete and accurate postdoc records
 - **Attend** Quarterly Postdoctoral Administrator meetings
 - **Advocate** for network building opportunities – include Postdocs in department functions, i.e., email lists, academic and social activities where they will become part of the unit/lab

<https://postdocs.stanford.edu/postdoctoral-administrators/new-administrators/administrator-responsibilities>

POSTDOC ADMIN: OPA RESOURCES

- OPA's Website Contains:
 - All Policy and Procedural Information
 - Postdoc Admin Home Page
 - PD Web Forms Training Slides and Job Aids
 - Postdoctoral Benefits Information
 - Postdoc Administrator Blog
 - Searchable archive of historical policy memos and quarterly meeting presentation slides

<http://postdocs.stanford.edu>

POSTDOC ADMIN: OPA RESOURCES

- OPA Managers, by School
 - **School of Medicine**
 - Alistair Murray
 - alistair@stanford.edu
 - (650) 498-7618
 - **All other Schools and Dean of Research groups/independent labs**
 - Tammy Wilson
 - tjwilson@stanford.edu
 - (650) 380-1283

<https://postdocs.stanford.edu/about/staff>

POSTDOC ADMIN: OPA RESOURCES

- Department/Lab Orientation
 - Prepare a packet for New Postdocs
- Create an onboarding checklist:
<https://postdocs.stanford.edu/postdoctoral-administrators/orientation-toolkit-administrators>
- “Getting Started at Stanford” for Postdocs:
<https://postdocs.stanford.edu/onboardingchecklist>
- Find the answers: People and Offices to Support You:
<https://postdocs.stanford.edu/current-postdocs/people-and-offices-support-you>

POSTDOC ADMIN: OPA RESOURCES

- Postdoc Administrator's Mentoring Group
 - Expert Postdoc Administrators who volunteered to be available to other Postdoc Administrators to answer policy and process questions and to inspire interdepartmental collaboration among all Postdoc Administrators
 - Other Admins are a great resource for sharing information on department-level processes, reports, templates, etc.
 - Submit a [Service Now Help Ticket](#) to be connected to a Postdoc Admin Mentor

<https://postdocs.stanford.edu/postdoctoral-administrators/mentoring-group-postdoctoral-administrators>

POSTDOC ADMIN: OPA RESOURCES

- Subscribe to your School-specific email list for updates on OPA quarterly meetings, policy changes, program announcements:
 - Dean of Research Groups – dor-postdoc-admins@lists.stanford.edu
 - School of Humanities & Science – humsci-postdoc-admins@lists.stanford.edu
 - School of Earth Sciences – ses-postdoc-admins@lists.stanford.edu
 - School of Engineering – soe-postdoc-admins@lists.stanford.edu
 - School of Education – suse-postdoc-admins@lists.stanford.edu
 - School of Medicine – som-postdoc-admins@lists.stanford.edu
- Other Helpful Mailing Lists to Join
 - GFS updates – gradfinsupport
 - Bechtel I-Center updates – icenter-immigration-updates
- Subscribe Here: <https://uit.stanford.edu/service/maillinglists/tools>

POSTDOC ADMIN: OPA RESOURCES

- Professional Development Opportunities for Postdoc Admins
 - The Office of Postdoctoral Affairs and other central offices provide training for staff who manage postdocs
- Review Access to Postdoc Web Forms System for details
 - Benellogic Training
 - GFS Salary Policy and Entry
 - J-1 Scholar and H-1B Visa
 - Clinical Appointments

<https://postdocs.stanford.edu/postdoctoral-administrators>

POSTDOC ADMIN: GFS RESOURCES

- Personalized help with GFS:
 - [Service Now Help Ticket to GFS](#)
 - [GFS Help Page](#)
 - [GFS How To... Job Aids](#)
 - [PeopleSoft Training Center](#)

POSTDOC WEB FORMS

Roles, Training and Authority, Confidentiality



POSTDOC WEB FORMS: ROLES

- **Required - Admin (Role #1 Entry/Verify)**
 - *Creates and verifies* web forms for submission to OPA
- **Required - Department Manager/DFA (Role #3 Approver)**
 - Requests authority for all Roles
 - Approves web forms prepared by Admin (Role #1) and Coordinator (Role #2)
- **Optional - Coordinator (Role #2)** not used in most departments
 - Reviews the work of one or more Role #1 Admin(s) before Department Manager/DFA approval

POSTDOC WEB FORMS: TRAINING AND AUTHORITY

- **Postdoc Policy and Web Forms Training Request Form**
 - Required for Postdoc Admin (Role #1) and Coordinator (Role #2)
 - Not required for Department Manager/DFA (Role #3)
- **Request form sends email to Department Manager/DFA (Role #3) to confirm authority granting**

<https://postdocs.stanford.edu/postdoctoral-administrators/new-administrators/gain-access-postdoc-web-forms-system>

POSTDOC WEB FORMS: CONFIDENTIAL INFORMATION

- Information entered in Postdoc Web Forms are Student Records, subject to the Family Educational Rights and Privacy Act of 1974 (FERPA)
 - Postdocs can request access to their postdoc records
- PeopleSoft sends a notification to Postdoc of any change being made to their records
- **Confidential, performance review, or other sensitive information should *not* be entered into Postdoc Web Forms**

THE POSTDOCTORAL APPOINTMENT

Criteria, Processing Timelines, Policy Exceptions, SUNet ID Sponsorship



POLICY: APPOINTMENT CRITERIA

- **Registration fee:** \$125 per quarter, paid by Dean (SOM) or Provost (University)
- **Start date:** Within 3 years of PhD conferral or 6 years of MD conferral
- **FTE basis:** Full time, 100% FTE required
- **Minimum term:** 9 months for new appointments
- **Maximum term:** 60 months (5 years) combined (all institutions) TOTAL term limit
- **Extensions:** In increments of days, weeks, months, years (up to 60 month term limit)
- **6th Training Year:** Policy exception approval required for 6 years combined TOTAL term limit
- **Funding level:** Minimum funding amount required, no maximum funding limit
- **Funding source:** Allowable department funds, research grants, training grants, or external fellowships, in any suitable combination of sources; *postdocs cannot* be self-supporting
- **Benefits:** Medical, dental, vision, disability, and leave benefits
- **Unpaid Leave:** 90 day maximum leave period
- **Start date:** Up to 30 days retroactive for good cause (valid work status required)

<https://postdocs.stanford.edu/policy>

PROCESS: APPOINTMENT PROCESSING TIMELINES

- Appointments should be submitted to OPA with ALL Required Supporting Documents early enough to allow for adequate processing time at OPA and Bechtel I-Center (if international)
 - **US Citizens, Permanent Residents, F1 Visas Holders with OPT:**
 - **5-7 business days** prior to the requested appointment start date
 - **J-1 Scholars:**
 - **2-3 months** prior to the requested appointment/visa start dates
 - **H-1B Visas Holders:**
 - **3-4 months** with premium processing; requires premium processing fee
- ***Submitting a Recommendation Form with incomplete supporting documents or insufficient proof of doctoral degree will result in processing delays in the timeframes noted above***

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

POLICY EXCEPTIONS: NEW APPOINTMENTS

- For new appointments that fall into the following categories, an approved policy exception is required for appointment approval:
 - **Appointment term is less than 9 months**
 - Permitted only for Stanford PhD grads who need a few months to finish PhD work or bridge time to a new position elsewhere
 - **PhD conferred more than 3 years ago**, or MD conferred more than 6 years ago
 - **Joint appointments with other institutions**
- How to Proceed:
 - Submit an Other Type of Policy Exception smart sheet
 - Give a brief description of the reason the policy exception is needed
 - OPA will review the request and render a decision

POLICY EXCEPTIONS: EXISTING APPOINTMENTS

- Over the course of a postdoctoral appointment, circumstances may change such that a policy exception review is needed for the appointment to continue
- Examples:
 - **Reduction of required 100% FTE**
 - Generally approved only for cases of medical illness or injury, or baby-bonding
 - **Unpaid leave of absence more than 90 days**
- How to Proceed:
 - Submit a Temporary FTE Reduction smart sheet (for reduced FTE) or an Other Type of Policy Exception smart sheet (for extended unpaid leave)
 - The request should explain the need for and benefit of the policy exception, duration of the exception, and any other important details
 - OPA will review the request and render a decision

POLICY EXCEPTIONS: SUPPORTING DOCUMENTS REQUIRED

- **Policy Exception for a Sixth Year of Postdoctoral Training**

- New appointments with previous research experience that include a 6th year of combined total research experience may be permitted if approved by the Faculty Subcommittee
- The maximum term limit is 72 months
- Requires additional supporting documents
- Follow the [Request a Sixth Training Year Policy Exception](#) smart sheet dashboard for instructions

PROCESS: SUNET ID SPONSORSHIP

- A SUNet ID and Stanford email address are included as part of the postdoc appointment
 - OPA creates the Student ID (Empl ID) number after the appointment is approved
 - The Postdoc uses the Student ID to create a SUNet ID
- In some cases, the department may wish to sponsor a SUNet ID in advance of the appointment approval
 - Please ensure proper procedures are followed to avoid creation of a duplicate ID
 - Conduct a SEARCH/MATCH in AXESS to determine if there is an existing Student ID
 - If Admin does not have access to SEARCH/MATCH, contact OPA to do the search
- **Make a note of the existing or newly created Student ID in the “Notes to Approver” on the Recommendation Form to notify OPA**

THE POSTDOCTORAL APPOINTMENT

Who Can Sponsor a Postdoc, Budgeting for a Postdoc, Determining
Candidate Eligibility!



POLICY: WHO CAN SPONSOR A POSTDOCTORAL APPOINTMENT?

Faculty Sponsors Must be **Members of the Professoriate**

- Tenure Line Faculty (UTL)
 - Assistant Professor
 - Associate Professor
 - Professor
- Non-Tenure Line Faculty (NTL-)
 - Assistant Professor (Research)
 - Associate Professor (Performance, Teaching, Research)
 - Professor (Applied Research, Clinical, Performance, Teaching, Research)
- Medical Center Line Faculty (MCL)
 - Assistant Professor
 - Associate Professor
 - Professor
- Other Faculty Designations
 - Assistant Professor (Subject to PhD)
 - Senior Fellow at designated policy centers and institutes (defined in [Section 2.3.2](#))
 - Center Fellow at designated policy centers and institutes (defined in [Section 2.3.2](#))

POLICY: WHO CAN SPONSOR A POSTDOCTORAL APPOINTMENT?

- Cannot Be a Faculty Sponsor
 - School of Medicine
 - Clinician/Educators (C/E) line appointed as:
 - Clinical Instructor (unless granted a policy exception)
 - Senior Staff Scientist
 - Staff Scientist
 - Courtesy Professorships
 - Adjunct Professorships

PROCESS: BUDGETING FOR A POSTDOCTORAL APPOINTMENT

What is the Department's Cost of a Postdoctoral Appointment?

- **Funding minimum**
 - \$68,238 annually as of 09/01/22
 - Departments or PI may set a higher funding level
- **Benefits Expense**
- **Other Cost Considerations:**
 - Not included in this table due to variations across schools
 - *Fringe Rates and/or Indirect Costs*
 - Work with your department's Grants Manager to determine if fellowship will incur these costs
 - *Research & Lab Expenses*
 - As needed or anticipated
 - *Conference & Presentation Expenses*
 - As needed or anticipated

<https://postdocs.stanford.edu/budgeting-postdoctoral-fellowship>

Coverage	Annual insurance* (paid in monthly installments)	Minimum Annual Salary**	Minimum Required Total Funding
Postdoc Only	\$10,753 +	\$68,238 +	\$78,991 +
PD + Spouse	\$21,540 +	\$68,238 +	\$89,778 +
PD + Children	\$17,475 +	\$68,238 +	\$85,714 +
PD + Family	\$29,920 +	\$68,238 +	\$98,158 +

* Rates will likely increase Calendar Year 2023 effective January 1, 2023. Estimate a 5% increase for months Jan 2023-on.

** Minimum will likely increase Academic Year 2023-24 effective September 1, 2023. Estimate a 4.5% increase for months Sep 2023-on.

PROCESS: DETERMINE ELIGIBILITY

- After confirming that the Faculty can sponsor a Postdoc and that adequate budget/funding exists, please **confirm the Postdoc Candidate is eligible** to be appointed as a postdoc
 - Predetermining eligibility avoids time wasted creating web forms for an ineligible Candidate
- Obtain the following documents from the Candidate:
 - Proof of doctoral degree
 - Outside funding letter(s), if any
 - Current CV with dates in **mm/yyyy-mm/yyyy** format
 - (yyyy-yyyy format is not adequate to calculate research experience)

POLICY: DETERMINE ELIGIBILITY

- **Eligibility Criterion 1 – Completion of All Doctoral Degree Requirements**
 - Has the Candidate completed all degree requirements (PhD within the last 3 years or MD within the last 6 years) as evidenced by diploma, degree certificate, or letter of completion?
- **Review the Proof of Degree document**
 - If Yes, continue the eligibility review
 - If No, degree requirements are not complete, the Candidate is NOT eligible for a postdoc appointment
 - Consider a Visiting Student Researcher appointment through the University Registrar's Office, OR
 - Delay postdoc appointment start date until all degree requirements are met

POLICY: DETERMINE ELIGIBILITY

- **Eligibility Criterion 1 – Completion of All Doctoral Degree Requirements**
 - If the doctoral degree was conferred more than 3 years ago (PhD) or more than 6 years ago (MD), approval of an appointment requires:
 - An approved policy exception request
 - Less than 51 months of previous research experience
 - If Candidate has more than 51 months of previous research experience, he/she is NOT eligible for a postdoc appointment
 - Consider a Visiting Scholar appointment through Faculty Affairs, OR
 - Consider an Academic Staff-Research (AS-R) or Consultant appointment through Human Resources

POLICY: PROOF OF DEGREE

- **Proof of Doctoral Degree – Acceptable Documents**
 - **Copy of doctoral diploma or degree certificate:**
 - English translation required if issued in a foreign language
 - **In the absence of a diploma or degree certificate, a Letter of Completion is acceptable IF:**
 - Letter is issued by a Registrar or equivalent central office (Graduate Studies, Dean, Chancellor, etc.)
 - Letter confirms the date ALL degree requirements were completed, including submission, acceptance, and defense of thesis, and the expected date of degree conferral
 - See examples: Sample Degree Verification Letter 1 ; Sample Degree Verification Letter 2
 - **Transcript: Must note degree earned and conferral date (unofficial copy ok)**
- Stanford PhD graduates must upload proof of degree

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

POLICY: PROOF OF DEGREE

- **Proof of Doctoral Degree – Unacceptable Documents**
 - Letter from the ***PhD Advisor*** or **academic department**
 - Central office-issued letter that states all coursework is complete but does not confirm *all degree requirements have been met* (e.g., submission, acceptance, and defense of thesis)
 - To facilitate visa processing for international Scholars, central office letters noting an upcoming defense date *may* justify a review for a conditional DS-2019 approval in advance of the appointment approval
 - See the Visas for International Scholars slides for more information

POLICY: DETERMINE ELIGIBILITY

- **Eligibility Criterion 2 – Appointment or Employment Elsewhere**
 - Will the Candidate be appointed at another institution or employed elsewhere concurrently with the Stanford postdoctoral appointment?
 - **Review the CV for a current appointment or employment elsewhere**
 - Confirm any current appointment or employment will end prior to the start date of the Stanford postdoc appointment
 - **Carefully review outside funding letters and award contracts for language that specifically states, or implies an affiliation or employment elsewhere (funding called “salary”; tax withholdings, etc.)**
 - If No, continue the eligibility review
 - If Yes, the Candidate is NOT eligible for a postdoc appointment
 - Consider a Visiting Postdoc or Visiting Scholar appointment through Faculty Affairs

POLICY: DETERMINE ELIGIBILITY

- **Eligibility Criterion 3 – Previous Research Experience**
 - Does the Candidate have any previous postdoctoral research experience?
 - **Review the CV for previous appointments or employment that included postdoctoral research experience**
 - If No, the Candidate IS eligible for a postdoctoral appointment
 - If Yes, complete a Research Experience Calculator (see next slide)

PROCESS:

RESEARCH EXPERIENCE CALCULATOR

- For Candidates with previous postdoctoral research experience:
 - **Complete a Research Experience Calculator Smart Sheet**
 - Review Research Experience Calculation Dashboard for instructions
 - 1 to 51 months: the Candidate IS eligible for a postdoctoral appointment (in accordance with postdoctoral policy term limits)
 - 52+ months: the Candidate is NOT eligible for a postdoc appointment
 - Consider an Academic Staff-Research or Consultant appointment through Human Resources
 - **If Candidate is eligible, save the completed Research Experience Calculator as a PDF for later use in the appointment process**

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/calculate-months-experience-research-non-clinical>

APPLY YOUR KNOWLEDGE: SPONSORSHIP, BUDGET, & ELIGIBILITY

- ***Real World Training Scenario:***

- You are a new Postdoctoral Administrator for PI David Lobell, a Professor of Earth System Science, at the Freeman-Spogli Institute – Center on Food Security and the Environment
- Prof Lobell asked you to appoint a new Postdoc for fall quarter
- Before sending the appointment invite, you must confirm these things:
 - Prof Lobell is a member of the Professoriate who can sponsor a postdoc
 - Prof Lobell confirmed he has sufficient funding for salary, benefits, and extras
 - Postdoc Candidate is eligible to be appointed as a Postdoc at Stanford
- You obtain the Candidate's contact information and the appointment terms from Prof Lobell

PROCESS: INFORMATION NEEDED TO INITIATE APPOINTMENT

- Postdoc Candidate's First and Last Names
- Postdoc Candidate's email address
 - Email address must be valid for use until the appointment is approved
 - DO NOT use an email address previously used for a postdoc invite
 - (department transfers or returning Stanford postdocs)
- Appointment start and end dates
- Annual funding amount and funding source
- Any other terms offered or required by the sponsoring PI or department
 - (e.g., moving expense reimbursement, teaching requirements, etc.)
 - Follow your department's internal practices and policies

APPLY YOUR KNOWLEDGE: GATHER INFORMATION NEEDED

- ***Real World Training Scenario:***

- Professor Lobell provides the following information to you:
 - Candidate's First and Last Name: **Robin Hood**
 - Candidate's email address: **robinhood7490@gmail.com**
 - Appointment start and end date: **09/01/2022 – 08/31/2023**
 - Annual funding amount: **\$68,238**
 - Funding source: **Prof Lobell's research grant**
 - Additional appointment terms:
 - Up to \$2,500 reimbursement for moving expenses
 - Postdoc is required to teach a one quarter undergraduate class
- You email Robin, introduce yourself, and ask him to send you PDF copies of his doctoral degree and current CV
 - Robin will be fully supported by Prof Lobell and has no outside funding

APPLY YOUR KNOWLEDGE: ELIGIBILITY

Robin's Letter of Completion

University of Ocksford
Registrar's Office
4321 University Lane
Ocksford, GB
Tel 0111 555 2233

June 15, 2019

To Whom It May Concern:

Re: Robin Hood

The Academic Board of the University of Ocksford declares that Robin Hood, has been awarded the degree of Doctor of Philosophy, having defended a thesis entitled "Robbing the Rich to Feed the Poor," before an Examining Committee appointed by the Academic Board. The degree will be conferred at the next graduation ceremony to be held on September 14, 2019.

Sincerely,
Will Scarlett
Registrar

Robin's Current CV

Robin Hood
Robinhood7490@gmail.com

Education

- | | |
|---------------------|---|
| Sep 2014 – Jun 2019 | Doctor of Philosophy, University of Ocksford
"Robbing the Rich to Feed the Poor"
Supervisor: Prof. F. Tuck |
| Sep 2012 – Jun 2014 | Master of Science, University of Ocksford
"Testing Techniques to Rob the Rich to Feed the Poor"
Supervisor: Prof. M. Marion |

Research Experience

- | | |
|---------------------|---|
| Jul 2021 – Jun 2022 | Princeton University
Postdoctoral Scholar – Advanced Robbing Techniques
Supervisor: Prof. L. John |
| Jun 2019 – Jun 2021 | University of Ocksford
Postdoctoral Scholar – Robbing and Feeding
Supervisor: Prof. F. Tuck |

References

Prof. F. Tuck

APPLY YOUR KNOWLEDGE: ELIGIBILITY

- ***Real World Training Scenario:***
- Eligibility Criterion 1 – Completion of All Degree Requirements
 - Review Robin's letter of completion
 - **Has Robin completed all doctoral degree requirements?**
 - Yes, continue the eligibility review
 - **Was Robin's PhD degree conferred within the last 3 years?**
 - No, the degree was conferred more than 3 years ago
 - Calculate previous research experience to ensure it is within policy term limits
 - If less than 51 months or less, include a policy exception request with the Recommendation Form
 - Continue the eligibility review
 - If more than 51 months, STOP
 - Advise Prof Lobell that Robin is not eligible as a postdoc; consider another affiliation

APPLY YOUR KNOWLEDGE: ELIGIBILITY

- ***Real World Training Scenario:***
- Eligibility Criterion 2 – Appointment or Employment Elsewhere
 - Review Robin's CV
 - **Does Robin have an appointment or employment elsewhere?**
 - No, continue the eligibility review
- Eligibility Criterion 3 – Previous Research Experience
 - Review Robin's CV
 - **Does Robin have any previous postdoctoral research experience?**
 - Yes, complete a Research Experience Calculator spreadsheet

APPLY YOUR KNOWLEDGE: ELIGIBILITY

- **Real World Training Scenario:**
- Research Experience Calculator for Postdoc Candidate Robin Hood:
 - Robin has **36 months** of previous research experience
 - His first **12 months** of research experience was with his PhD advisor in his PhD lab and can be discounted per policy as a continuation of his PhD work
 - After discount, Robin has **24 months** of previous research experience, and is eligible for a postdoc appointment up to 3 years
 - Next steps:
 - **Save a copy of the Research Calculator Totals email in PDF format**
 - Initiate a new appointment invite web form

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/calculate-months-experience-research-non-clinical>

Research experience was calculated for Robin Hood based on data submitted in the Postdoc Research Experience Calculator form.

If revisions are needed, the totals noted below will change and a new Totals email will be sent.

Combined Previous Research Experience (from all previous appts) **24**

****For new appts: enter this number on the Recommendation web form in the Research Experience noted by Department field.****

NEW POSTDOCTORAL APPOINTMENT

Postdoc Admin: Process Overview, Initiate an Invite Web Form



NEW APPOINTMENT: PROCESS OVERVIEW

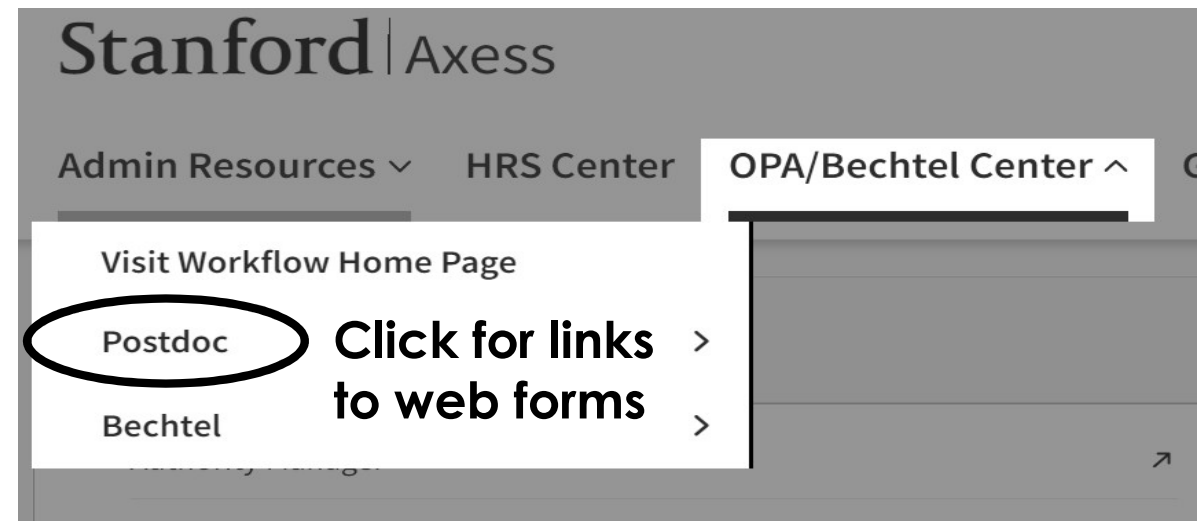
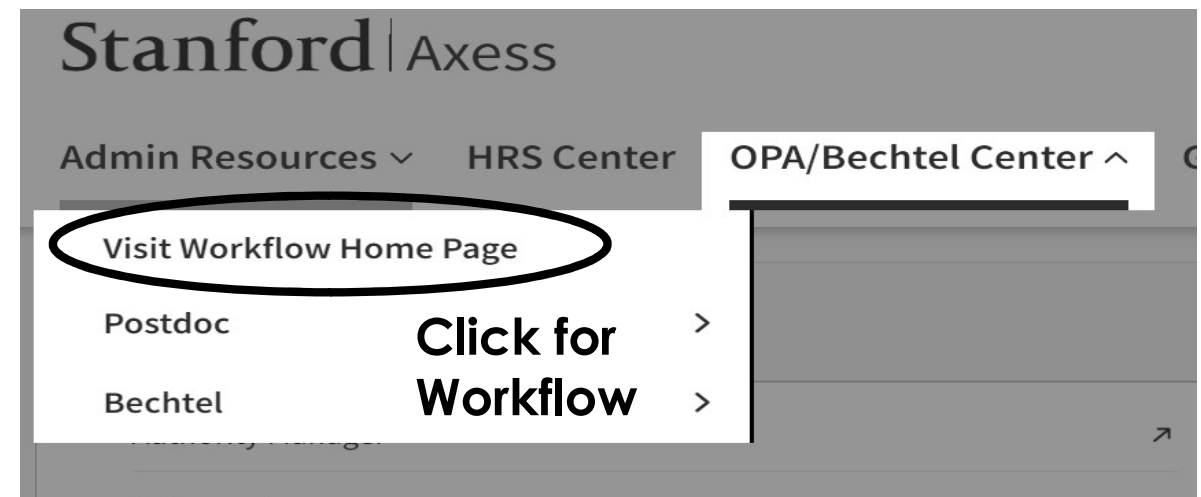
- Eligible Faculty Sponsor/PI identifies a Postdoc Candidate
- Postdoc Admin (Role #1) confirms budget and Candidate eligibility and initiates a Postdoc Invite Web Form
- Postdoc Candidate completes online Data Form (Information Sheet) and uploads required supporting documents
- Postdoc Admin (Role #1) reviews and approves the Data Form
- Postdoc Admin (Role #1 *Entry*) **creates and submits** a Recommendation Web Form
- Department Manager/DFA (Role #3) approves the Recommendation Form
 - generates the online Offer Letter to the Postdoc Candidate
- Postdoc Candidate reviews and accepts the online Offer Letter
- Postdoc Admin (Role #1 *Verify*) **verifies** the appointment terms **and approves** the Recommendation Form
- OPA reviews the Recommendation Form for appointment approval

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

CLICK STEPS: CREATE A RECOMMENDATION FORM

- **Helpful Hint:** OPA/Bechtel Center tab has *three* functions
 - **Click Visit Workflow Home Page** to view your workflow
 - **Click Postdoc** for links to web forms
 - **Click Bechtel** for links to visa information

<https://axess.sahr.stanford.edu/>



CLICK STEPS: INITIATE A NEW APPOINTMENT INVITE

- In AXESS:
 - Click the OPA/Bechtel Center tab
 - Click Postdoc
 - Click Postdoc Administrative Forms
 - Click Invite Form

Postdoc Administrative Forms

Postdoctoral Forms

Request Type

☐ Recommendation Form ☐ Termination Form ☐ Change Transactions ☐ LOA Form ☒ Invite Form

<https://axess.sahr.stanford.edu/>

CLICK STEPS: STF POSTDOC INVITE

- Skip the search fields
- **Click “Add” to initiate a new Invite**

Postdoctoral Forms


Request Type


☐ Recommendation Form ☐ Termination Form ☐ Change Transactions ☐ LOA Form ☒ Invite Form


First Name

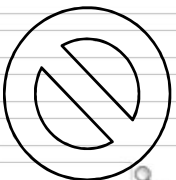
Last Name

Email ID

Department 

Manager ID 

Faculty ID 



CLICK STEPS: ADD A NEW VALUE

- The “Find an Existing Value” tab is used to search for previously sent Invites
- To Send a New Invite:
 - Click the “Add a New Value” tab
 - Email address entered must be valid until the appointment is approved
 - An email address can be used one time only in secure portal
 - DO NOT use an email address used for a prior postdoc invite
- **Real World Training Scenario:**
 - Enter Robin’s email address: robinhood7490@gmail.com
 - Click Add

STF PostDoc Invite

Find an Existing Value

Add a New Value

*Email ID robinhood7490@gmail.com

Add

Find an Existing Value | Add a New Value

CLICK STEPS: INVITE FORM DATA ENTRY

- **Enter the Candidate's First and Last names**
- **Enter the Department ID**
 - Click the magnifying glass to Look Up
 - Leave the search fields blank
 - Click Look Up
 - The Postdoc Admin's Academic Organization will display
 - Click on the Department ID to populate the DeptID field
- ***Real World Training Scenario:***
 - Enter Robin Hood's first and last names
 - Look up the Department ID for the Institute for International Studies

The screenshot shows the 'STF PostDoc Invite' form. The 'Applicant's Email' field is populated with 'robinhood7490@gmail.com'. The 'First Name' field contains 'Robin' and the 'Last Name' field contains 'Hood', both circled in black. Below these, the 'Department to which Postdoc Candidate is applying' section has a '*DeptID' field with a magnifying glass icon, also circled in black. To the right, a 'Look Up *DeptID' dialog box is open, showing search criteria for 'Department' and 'Description', both set to 'begins with'. Below the dialog, a 'Search Results' table is visible, with the first result 'INSTINTLST Institute for Intl Studies' circled in black. The table has columns for 'Department' and 'Description'. At the bottom of the form, the 'Email to Applicant' field shows a draft email starting with 'Dear Robin ,'. The 'Admin Contact' field shows '05707079' and 'Tammy Wilson'.

CLICK STEPS: HOW TO USE THE MAGNIFYING GLASS

- General instructions:
 - Click the magnifying glass
 - Enter search terms
 - Click the Look Up button
 - In the Search Results, click on the Empl ID field to populate the web form


STF PostDoc Invite


Applicant's Email: robinhood7490@gmail.com


First Name: Robin

Last Name: Hood

Department to which Postdoc Candidate is applying

*DeptID: INSTINTLST  Institute for Intl Studies

*Faculty Sponsor ID:  **Look Up *Faculty Sponsor ID**

Research Mentor ID: 

Admin Contact: 05707079

Email to Applicant:

Dear Robin Hood,

Tammy Wilson in INSTINTLST at Stanford is inviting you to become a new user on the site using the email address you provided.

If you have any questions regarding this invitation, please contact me at tammy.wilson@stanford.edu.

Once registered and logged-in to SecurePortal, you will be able to provide your demographic information, add your profile picture, and upload the required documents.

Empl ID: begins with

Name: begins with

Last Name: begins with LOBELL

First Name: begins with DAVID

Look Up **Clear** **Cancel** [Basic Lookup](#)

Search Results

View 100 of 1 results

Empl ID	Name	Last Name	First Name
05144732	Lobell, David Brian	LOBELL	DAVID

CLICK STEPS: FACULTY DATA ENTRY

- **Enter the Faculty Sponsor ID**
 - If ID is unknown, use Look Up
 - If the Faculty Sponsor is not found, you must add faculty to the list
- Enter the Research Mentor ID
 - If no Research Mentor is assigned, leave this field blank
- ***Real World Training Scenario:***
 - Look up Prof Lobell's ID number
 - Robin does not have a Research Mentor; leave this field blank

STF PostDoc Invite

Applicant's Email: robinhood7490@gmail.com

First Name: Robin

Last Name: Hood

Department to which Postdoc Candidate is applying

*DeptID: INSTINTLST Institute for Intl Studies

*Faculty Sponsor ID:

Research Mentor ID:

Admin Contact: 05707079

Email to Applicant:

Dear Robin Hood,

Tammy Wilson in INSTINTLST at Stanford is your new user on the site using the email address robinhood7490@gmail.com.

If you have any questions regarding this invitation, please contact me at 650-725-7079.

Once registered and logged-in to SecurePortal, you will be able to provide your demographic information, add your research interests, and upload the required documents.

Look Up *Faculty Sponsor ID

Empl ID: begins with

Name: begins with

Last Name: begins with LOBELL

First Name: begins with DAVID

[Basic Lookup](#)

Search Results

View 100 First 1 of 1 Last

Empl ID	Name	Last Name	First Name
05144732	Lobell, David Brian	LOBELL	DAVID

CLICK STEPS: SAVE AND SEND

- **You may add new text** to the standard Invite text
 - **Added text may NOT alter standard invite terms and must be in accordance with both postdoctoral and University policies**
- **DO NOT delete standard** Invite text
- Entered data populates the Invite text after you click SAVE
- Click “Send Mail” to send the Invite to the Candidate

STF PostDoc Invite

Applicant's Email: robinhood7490@gmail.com

First Name:

Last Name:

Department to which Postdoc Candidate is applying

*DeptID: Institute for Intl Studies

*Faculty Sponsor ID: David Lobell Phone: Email Addr:

Research Mentor ID: Phone: Email Addr:

Admin Contact: 05707079 Tammy Wilson Phone: Email Addr:

Email to Applicant: ☐ Email Sent: No Email Sent On:

Dear Robin Hood,

Tammy Wilson in INSTINTLST at Stanford University has initiated your postdoctoral appointment process. Please go to <http://secureportal.stanford.edu> to register as a new user on the site using the email address you provided to receive this message.

If you have any questions regarding this important step to initiate your appointment, please contact Tammy Wilson at pacs-dev-emails@stanford.edu.

Once registered and logged-in to SecurePortal.stanford.edu, please click on "New Postdoctoral Scholar Data Form" to begin completing your information. You will provide your demographic information, academic history, employment history, and upload the required documents listed below. You may save and return to SecurePortal.stanford.edu until you are ready to submit your information. The appointment process cannot start at Stanford until you have submitted this information and the required documents.

Required Documents (in .pdf or .jpg formatting):

1. Your Doctoral Diploma. If you do not have a diploma, provide an official letter from your university's Registrar or equivalent central office confirming your completion of all doctoral degree requirements and your expected degree conferral date. Academic department letters are not accepted.

CLICK STEPS VIDEO: NEW APPOINTMENT INVITE

55

Stanford University

AXESS
UAT2

MY
AXESS

GFS
CENTER

EMPLOYEE
CENTER

ADMIN
RESOURCES

WORKFLOW
HOME

OPA/BECHTEL
CENTER

STARS

CS
Admin

Admin
Favorites

Workflow Home

Workflow Home

0My Approvals

0My Pending Requests

0My S

My Approvals

EMPLOYEE EXTERNAL LINKS

Administrative Guide

Benefits

Faculty & Staff Help Center

Parking & Transportation Services

Stanford Accounts

Stanford Directory

StanfordYou

University Human Resources

University IT

ACADEMIC EXTERNAL LINKS

Explore Courses

Order IT

Financial Aid Office

Student Services Center

Explore Degrees

Registrar's Office

Housing and Dining

Vaden Health Center

AXESS HELP

Help Ticket

Tips for Using Axess

Report Accessibility Issues

LEG

Com

Pat

NEW APPOINTMENT

Postdoc Candidate's View of Invite and Data Form



PROCESS:

CANDIDATE'S VIEW OF THE INVITE EMAIL

From: workflow@psprcprd01.stanford.edu <workflow@psprcprd01.stanford.edu>
Sent: Monday, February 25, 2019 3:48 PM
To: Robinhood7490@gmail.com
Subject: Important Notification to Start Your Stanford Postdoctoral Appointment Process.

Dear **Robin Hood**,

Tammy Wilson in INSTINTLST at Stanford University has initiated your postdoctoral appointment process. Please go to <http://secureportal.stanford.edu> to register as a new user on the site using the email address you provided to receive this message.

If you have any questions regarding this important step to initiate your appointment, please contact Tammy Wilson at tjwilson@stanford.edu

Once registered and logged-in to SecurePortal.stanford.edu, please click on "New Postdoctoral Scholar Data Form" to begin completing your information. You will provide your demographic information, academic history, employment history, and upload the required documents listed below. You may save and return to SecurePortal.stanford.edu until you are ready to submit your information. The appointment process cannot start at Stanford until you have submitted this information and the required documents.

Required Documents (in .pdf or .jpg formatting):

1. Your Doctoral Diploma. If you do not have a diploma, provide an official letter from your university's Registrar or equivalent central office confirming your completion of all doctoral degree requirements and your expected degree conferral date. Academic department letters are not accepted.
2. Your Curriculum Vitae (CV). Your CV must be up-to-date, and should include:
 - a. Specific degrees earned, e.g., PhD, MD, MBBS, etc.
 - b. Dates of any post-graduate time in the form of MONTH/YEAR or MONTH/DAY/YEAR (do not list as just YEAR to YEAR).

3. If you are not a US citizen, please include:

- a. all identification pages of your passport and any dependents (spouse/child) who will join you at Stanford.
- b. any of your previous visa-related documents such as, DS-2019, OPT application or OPT-EAD Card, any receipts of pending change of status petitions.

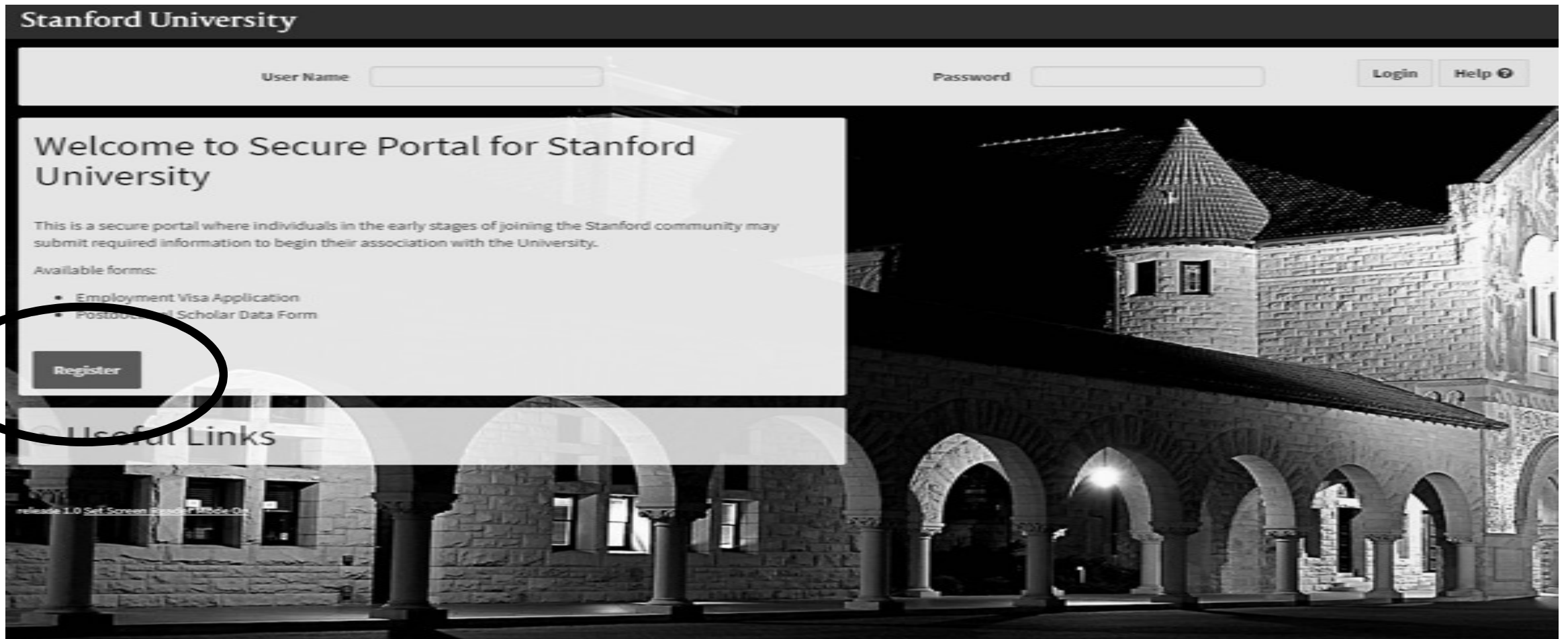
4. If your funding will be covered through an externally-awarded fellowship, government agency, or other non-Stanford sources, a copy of your funding letter(s) is required. All funding letters must include the following:

- a. A letter for each source of funding on funding agency's letterhead in English.
- b. Exact dates for when the funding is to be used.
- c. The total award amount, what exactly the funds cover, and in what amounts (e.g., stipend, insurance, travel, etc.)
- d. Time of payment installments, and whether it is transferred in foreign currency or USD.

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

To learn more about postdocs at Stanford (benefits, finding housing, postdoc groups, professional development, etc.), please visit the Office of Postdoctoral Affairs website: http://postdocs.stanford.edu/incoming_scholars/prior_to_arrival.html.

PROCESS: CANDIDATE REGISTERS A USER ID AND PASSWORD



Stanford University

User Name Password Login Help

Welcome to Secure Portal for Stanford University

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

Available forms:

- Employment Visa Application
- Postdoctoral Scholar Data Form

[Register](#)

Useful Links

release 1.0 Self Screen Reader Mode On

PROCESS:

CANDIDATE MUST USE **SAME** EMAIL ADDRESS WHERE INVITE WAS SENT

Register

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

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

All fields are required. Your email address will be used only to send a reminder in the event you forget your password.

First Name

Robin

Last Name

Hood

User Name (should be lower case)

robin7490

Email

robinhood7490@gmail.com

Password

minimum 8 characters

PROCESS:

CANDIDATE LOGS IN WITH CREATED USER ID AND PASSWORD

Stanford University

User Name

Password

Login Help ⓘ

Welcome to Secure Portal for Stanford University

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

Available forms:

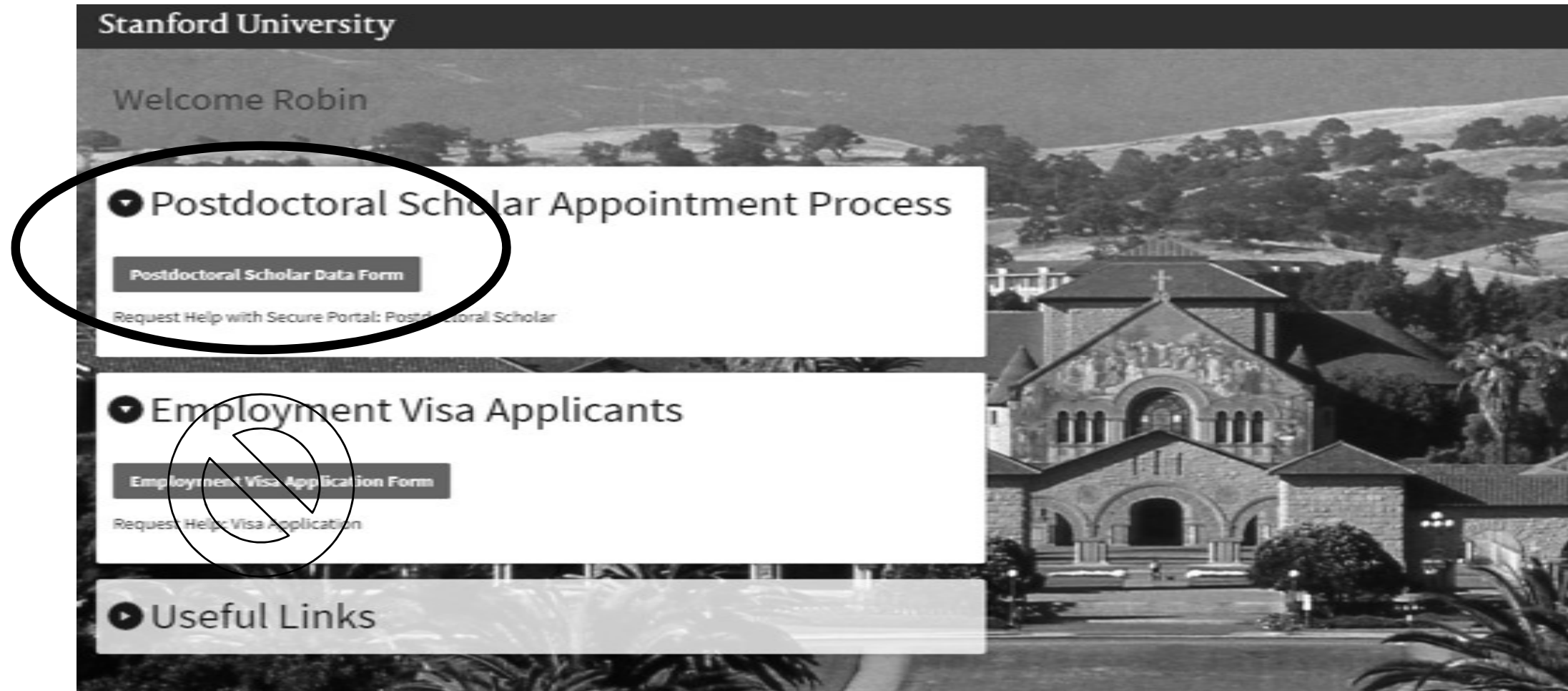
- Employment Visa Application
- Postdoctoral Scholar Data Form

Register

► Useful Links

PROCESS:

CANDIDATE CLICKS POSTDOCTORAL SCHOLAR DATA FORM LINK



PROCESS:
CANDIDATE MUST USE **SAME** EMAIL ADDRESS HERE AS PREVIOUS

Postdoctoral Scholar Data Form

Personal Details Personal Addresses Ethnicity Ext. Funding Details Education Details

Personal Addresses

All fields are required unless noted.

Email address

robinhood7490@gmail.com

Important Reminder: Email address entered here MUST match email address used by the Stanford Department to invite you to fill out this form.

PROCESS: CANDIDATE MAY ENTER OR SKIP ETHNICITY DATA

Ethnicity

Submission of ethnicity information is voluntary and not required as part of the Postdoctoral Scholar appointment process. Stanford invites all postdoctoral scholars to provide this information for analysis and reporting only. Submitted information will be kept confidential.

You may opt to skip this page.

Are you Hispanic or Latino? optional ⓘ

- ☐ Decline to state
- ☐ Yes, I am Hispanic or Latino
- ☐ No, I am not Hispanic or Latino

2) What is your race? optional ⓘ

Select one or more

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Native Hawaiian or Other Pacific Islander
- ☒ White

PROCESS:

CANDIDATES WITH OUTSIDE FUNDING MUST ENTER DETAILS AND UPLOAD COPY OF FUNDING LETTER

Postdoctoral Scholar Data Form



External Funding Details

Funding Guidelines for Postdoctoral Scholars

Add Funding Details if your postdoctoral appointment will be fully or partly funded through a fellowship from a source outside of Stanford.

Skip this section if your support will be completely provided through grants or other Stanford University sources (i.e., if you'll be paid by your mentor's research grants/lab funds.)

Do not include information about applications in progress for funding.

Add all external funding sources. Repeat "Add Funding Details" if you have multiple funding sources to report.

[+ Add Funding Details](#)

[Previous](#)

[Home](#)

[Save As Draft](#)

[Next](#)

PROCESS:

CANDIDATE MUST ENTER EDUCATIONAL DATA

- Candidate searches for institution in pre-populated table
 - May use “Unlisted University” if institution is not found
 - Enter “unl” and click Search
- **Doctoral degree information is required**
- Candidate should enter degree information only in this section
 - Residencies, postdoctoral fellowships, and other training are entered in the Work Experience section

The screenshot shows a web application interface for entering education details. A modal window titled 'Education Details' is open, displaying a form with several fields. The 'Institution' field is highlighted with a red oval. The form includes instructions: 'All fields are required.' and 'Please click the box beside the field and enter the name of the city or the name of the institution where you received your degree. If your institution is not on the list, search for and select "Unlisted University".' Below the 'Institution' field is a dropdown menu with an upward arrow icon. Other fields visible include 'Field of study', 'Degree' (with a dropdown menu showing 'Select Degree'), 'Start Date of Attendance', and 'End Date of Attendance'. The background shows a partially visible 'Add Education details' button and navigation links like 'Previous', 'Home', and 'Save As Draft'.

PROCESS:

CANDIDATE CAN RETURN TO PREVIOUS PAGE AND EDIT SAVED ENTRIES

Education Details

Include all programs where you received a degree (undergraduate, graduate and postgraduate study such as certificates or licensure).

Do not provide information about prior postdoctoral training or medical residency here; you will record this information under Work Experience in the next section.

Repeat the "Add Education Details" process for any additional degrees.

 Add Education details

	Institution ID	Country	Start Date	End Date	Degree	Degree Date	Field Of Study	Phd Advisor Name	Phd Dissertation Title
	University of Oxford	GBR	19-SEP-11	15-JUN-16	PHD	15-JUN-16	Food Security	Friar Tuck	Robbing the Rich to Feed the Poor

PROCESS:

CANDIDATE MUST ENTER WORK EXPERIENCE AFTER DOCTORAL DEGREE

Work Experience

Enter relevant training and work history. Include medical residencies, teaching or research appointments, postdoctoral fellowship appointments, or other.

Repeat "Add Work Experience" if you have multiple positions to report.

Stanford University's Policy on Calculating Postdoctoral Months of Experience

 Add Work Experience

	Position/Title	Company/Institution	State	City	Country	Start Date	End Date	Work Activity
	Postdoc	Oxford University	Greater London	Oxford	GBR	16-JUN-16	15-JUN-18	Research - postdoctoral training
	Postdoc	Princeton University	NJ	Princeton	USA	01-JUL-18	30-JUN-19	Research - postdoctoral training

PROCESS:

CANDIDATE UPLOADS REQUIRED SUPPORTING DOCUMENTS

Required Documents

Please upload .PDF or .JPEG copies of the following required documents:

- 1. Your Doctoral Diploma.** If you do not have a diploma, provide an official letter from your university's Registrar or equivalent central office confirming your completion of all doctoral degree requirements and your expected degree conferral date. Academic department letters are not accepted.
- 2. Your Curriculum Vitae (CV).** Your CV must be up-to-date, and should:
 - a. Explicitly list degrees earned and in progress, e.g., PhD, MD, MBBS, etc.
 - b. List dates of any post-graduate time in the form of MONTH/YEAR or MONTH/DAY/YEAR (do not list as just YEAR to YEAR).
- 3. If you are not a US citizen, please include:**
 - a. All identification pages of your passport and any dependents (spouse/child) who will join you at Stanford.
 - b. Any of your previous visa-related documents such as, DS-2019, OPT application or OPT-EAD Card, any receipts of pending change of status petitions.
- 4. If your funding will be covered through an externally-awarded fellowship, government agency, or other non-Stanford sources, a copy of your funding letter(s) is required.** All funding letters must include the following:
 - a. A letter for each source of funding on funding agency's letterhead in English and signed by an agency official.
 - b. Exact dates for when the funding is to be used.
 - c. The total award amount, what exactly the funds cover, and in what amounts [e.g., stipend, insurance, travel, etc.]
 - d. Time period of the award, and whether it is transferred in foreign currency or USD.

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 YOUR DOCUMENTS:

1. Be sure that each document has a meaningful file name (e.g., YourName Doctoral Diploma.pdf).
2. Click the "Browse" button to locate a document on your hard drive (.pdf or .jpg files only).
3. After selecting the document, click "Upload Document".

Please note: There is no "delete" function in this document upload system. If you upload an incorrect document, please contact your departmental postdoctoral administrator after you have submitted your information to have them delete the document.

 Upload Document

Upload Document

No file chosen

Uploaded Documents

[Previous](#)

[Home](#)

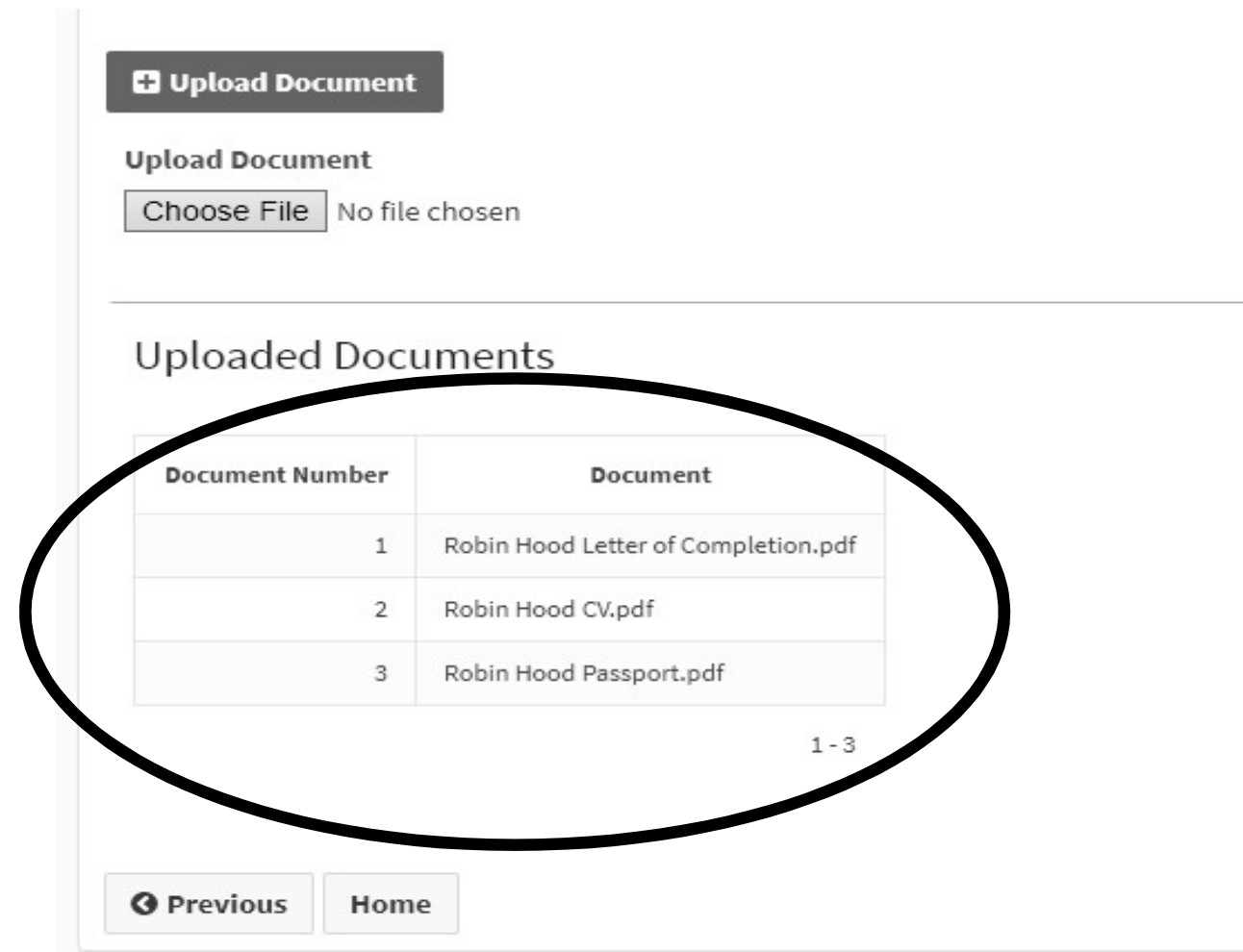
[Next](#)

PROCESS:

CANDIDATE CAN SEE UPLOADED DOCUMENT LIST BUT CANNOT DELETE

documents upload best

- **PNG, TIF, and DOCX** files are **NOT** compatible and may not open or display properly
- If Candidate has trouble uploading documents to the Data Form, documents can be emailed to Postdoc Admin for later upload
- Postdoc Admin can delete documents that Postdoc uploaded in error



The screenshot shows a web interface for uploading documents. At the top, there is a dark button labeled '+ Upload Document'. Below it, the text 'Upload Document' is followed by a 'Choose File' button and the text 'No file chosen'. A horizontal line separates this from the 'Uploaded Documents' section. This section contains a table with two columns: 'Document Number' and 'Document'. The table lists three documents: 1. Robin Hood Letter of Completion.pdf, 2. Robin Hood CV.pdf, and 3. Robin Hood Passport.pdf. The table is circled in black. Below the table, the text '1 - 3' is visible. At the bottom, there are two buttons: 'Previous' and 'Home'.

Document Number	Document
1	Robin Hood Letter of Completion.pdf
2	Robin Hood CV.pdf
3	Robin Hood Passport.pdf

1 - 3

Previous Home

PROCESS:

CANDIDATE MUST CLICK “AGREE” TO SUBMIT DATA FORM

- Candidate must agree to a background check
- The appointing department may or may not choose to conduct a background check

Submit Application

Agreement

I authorize Stanford University to conduct a thorough investigation of my prior employment and to cooperate in such an investigation, to execute any consent forms required in connection with my appointment and appointment termination could result from investigation results. I certify that statements containing misleading or omitted information could result in appointment termination in cases where

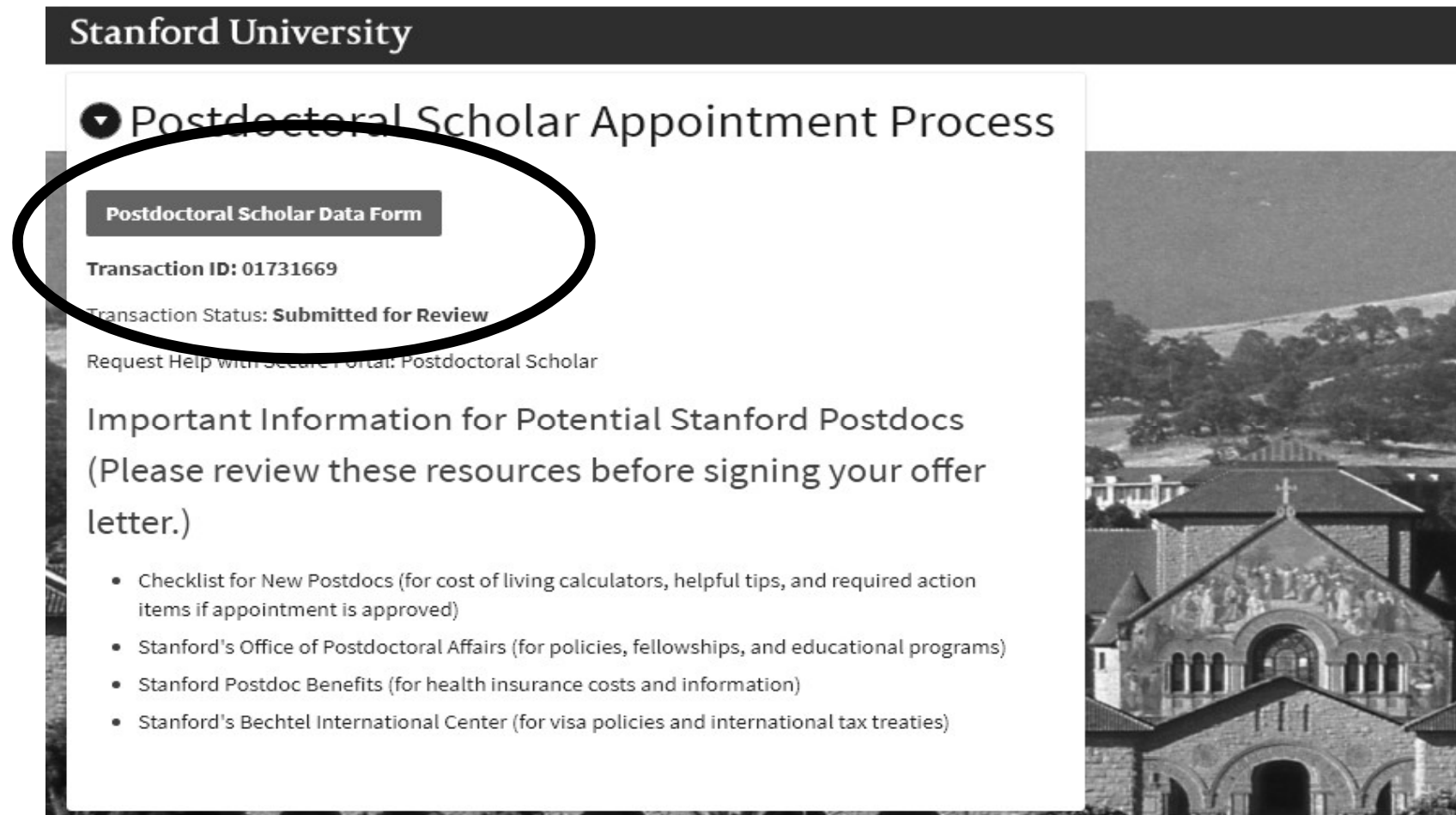
Agreement

☒ I Agree


◀ Previous

Home

PROCESS: CANDIDATE'S DATA FORM SUBMISSION CONFIRMATION MESSAGE



PROCESS: ADMIN'S EMAIL NOTICES OF DATA FORM SUBMISSION

Wed 3/6/2019 12:32 PM
 workflow@psprcprd01.stanford.edu
 Information sheet with a transaction id #01731669 has been submitted.

To: Tammy Jo Wilson
 CC: ☐ FYI only


Robin Hood has submitted information to initiate the paperwork for a postdoctoral appointment in INSTINTLST

You must now carefully check all information provided in the Information Sheet and review the attached documents that the prospective postdoc has provided in accordance with University policy.

NOTE: Once the Information Sheet is "approved" by you, the Information Sheet data is locked and cannot be edited by you or OPA.

Helpful Tips in Reviewing the Information Sheet:

- If any information is incorrect, you must "RETURN" to the postdoc for correction (via Workflow).
- Use documents uploaded to the Information Sheet by invited postdoc to check data.
- International Postdocs - data MUST MATCH PASSPORT, machine-readable text (alphanumeric characters)
- Dual Citizenship - must use the information on the passport they will be using to enter the US
- Birthdates - US format (mm/dd/yyyy)
- Funding - in US\$
- If any of the required document attachments are 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.

Wed 3/6/2019 12:32 PM
 workflow@psprcprd01.stanford.edu
Robin Hood has requested your on-line approval for Initial PostDoc Request

To: Tammy Jo Wilson

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

LAST NAME: Hood
 FIRST NAME: Robin
 TRANSACTION ID: 01731669

Please log into Axxess (<https://axess.stanford.edu/>) and click on the "OPA/Bechtel Center" tab on the top bar which will open the workflow where you can review the request.

NEW APPOINTMENT

Postdoc Admin: Data Form Review



PROCESS: REVIEW THE DATA FORM

- **IMPORTANT: After Postdoc Admin approves the Data Form, the data is LOCKED and errors cannot be corrected by ANYONE**
- If any data is incorrect you can RETURN the Data Form to the Candidate for revision
 - Do NOT click DECLINE as this ends the invite process
 - Restarting invite requires sending a NEW Invite to a NEW email address

PROCESS:

REVIEW THE DATA FORM (INFO SHEET)

- To review the Data Form
 - In AXESS
 - Click on OPA/Bechtel Center tab
 - Workflow Transaction List field
 - Click My Approvals
 - Activity field
 - Click PD-INFO-SHEET
 - Workflow Activity Description
 - Click on the Data Form to review
 - The web form opens

<https://axess.sahr.stanford.edu/>

The screenshot shows the AXESS OPA/Bechtel Center interface. The top navigation bar includes links for MY AXESS, GFS CENTER, EMPLOYEE CENTER, ADMIN RESOURCES, WORKFLOW HOME, and OPA/BECHTEL CENTER (which is circled). Below this, the 'My Workflow Dashboard' section contains two dropdown menus: 'Work Flow Transaction list' (set to 'My Approvals') and 'Activity' (set to 'PD-INFO-SHEET'), both of which are circled. To the right of these dropdowns is a clipboard icon labeled 'WORKFLOW'. Below the dashboard, there is a table with the following columns: Web Form Transaction ID, Workflow Activity Description, Transaction Status, Originator Name, Originated On, Received On, and Ident.

Web Form Transaction ID	Workflow Activity Description	Transaction Status	Originator Name	Originated On	Received On	Ident
01731669	Hood, Robin-PostDoc Request Type-Initial 01	Pending		03/04/19	03/04/19	

An arrow points to the 'Web Form Transaction ID' cell of the first row in the table.

PROCESS: REVIEW THE DATA FORM

- Compare information in the Data Form to the Candidate's documents
- Candidate documents are found in the Nolij database
- **In the Data Form, note the Applicant ID# for use in Nolij**
 - *Applicant ID# is NOT the same as the EMPLID# or Student ID#*



The screenshot shows a web-based data form. At the top, there is a tab labeled 'Request'. Below it, the 'Applicant ID: 40527' is displayed and circled with a thick black oval. Underneath, there is a section titled 'Personal Details' which contains various fields for personal information, organized in two columns.

*+Last Name:	Hood	*+First Name:	Robin
+Middle Name:		Other Names:	
Social Security Number:		*+Date of Birth:	07/04/1990
Tax Payer ID:		*Birth City:	Sherwood Forest
*Birth State or Province:	Greater London	*Birth Country:	GBR United Kingdom
*Sex:	<input checked="" type="radio"/> Male <input type="radio"/> Female	*Marital Status:	Single
*Country of Citizenship:	GBR United Kingdom	*Country of Residence:	GBR United Kingdom
*Visa status requested at Stanford:	Exchange Visitor(J-1)		
Visa Expiration details / Permanent Resident Number, if applicable:			

PROCESS: REVIEW THE DATA FORM

- Open a new browser tab and open Noli using this URL:
<https://imaging.Stanford.edu/NoliWeb/>
- Click “Proceed without Java” if message appears
- **Enter the Applicant ID from the Data Form in the EMPLID field**
 - Click Enter
- A folder labeled with the entered number appears
 - Click on the folder to open the document list

The screenshot shows the Noli Web interface. At the top, there is a header with 'perceptive' and 'Tools'. Below this is a 'Workflow/View' dropdown. The main section is titled 'Workflow : Post Doc WF'. Below this, there is a field labeled 'EMPLID' with the value '40527' entered. This field is circled in black. Below the 'EMPLID' field, there is a 'Current Inbox' dropdown set to 'Not in Workflow'. Below this, there is a folder icon and the text 'POST_DOC_VERSION_1.0 1'. Below this, there is a folder icon and the text '40527', which is also circled in black. A thick black arrow points from the '40527' folder to a table on the right. The table has two columns: 'Name' and 'Created'. It contains three rows of data:

Name	Created
Robin Hood Letter of Completion.pdf	2019 Mar 4 15
Robin Hood CV.pdf	2019 Mar 4 15
Robin Hood Passport.pdf	2019 Mar 4 15

CLICK ON A DOCUMENT TO OPEN IT

perceptive
User - Postdoctoral Affairs
Logout

WorkflowView

Workflow : Post Doc WF

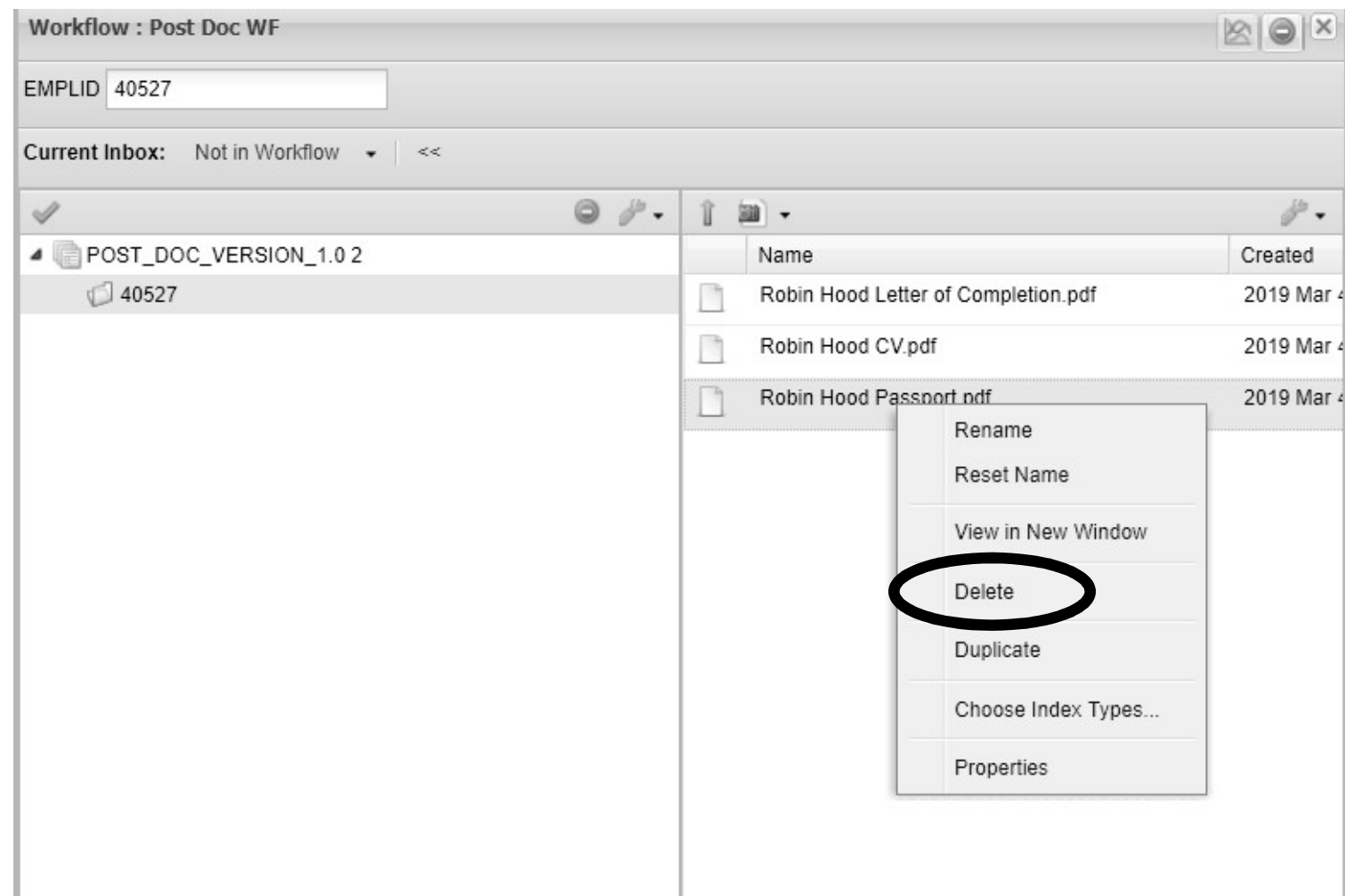
EMPLID 40527

Current Inbox: Not in Workflow <<

Name	Created
POST_DOC_VERSION_1.0 1	
40527	
Robin Hood Letter of Completion.pdf	2019 Mar 4 15:3...
Robin Hood CV.pdf	2019 Mar 4 15:3...
Robin Hood Passport.pdf	2019 Mar 4 15:3...

PROCESS: OTHER NOLIJ ACTIONS

- Admin can delete documents in unsupported formats and return Data Form to Postdoc Candidate to upload documents in PDF or JPEG format
- **To delete a document:**
 - Right click on the doc title
 - Click delete in the menu
- **To upload a document:**
 - Drag PDF file from email attachment or from computer folder and drop into the list



- | Personal Details | |
|-------------------------|------------|
| *Last Name: | Hood |
| *First Name: | Robin |
| *Middle Name: | |
| Other Names: | |
| Social Security Number: | |
| *Date of Birth: | 07/04/1990 |

- **Birthdates –Compare to Passport**

- Must be in U.S. format (07/04/1990)
 - Watch for European format (e.g., 04/07/1990)
 - Watch for current year in place of birth year (e.g., 07/04/2020)
- Birth City/State
 - Watch for foreign city and **US state** (e.g., Beijing, CA)

Social Security Number:		*Date of Birth:	07/04/1990
Tax Payer ID:		*Birth City:	Cherwood Forest
*Birth State or Province:	Greater London	*Birth Country:	GBR United Kingdom
*Sex:	<input checked="" type="radio"/> Male <input type="radio"/> Female	*Marital Status:	Single
*Country of Citizenship:	GBR United Kingdom	*Country of Residence:	GBR United Kingdom
*Visa status requested at Stamford:	Exchange Visitor(J-1)		

PROCESS: REVIEW PERSONAL DETAILS FOR U.S. CITIZENS

- **Name, Birth Date, SSN – Compare to I-9 documents**
 - e.g., driver's license, social security card, etc.
- Review Gateway to Financial Activities
 - http://web.stanford.edu/group/fms/finance/staff/payadmin/payadmin_student.html

Personal Details			
*Last Name:	Hood	*First Name:	Robin
+Middle Name:		Other Names:	
Social Security Number:		*Date of Birth:	07/04/1990
Tax Payer ID:		*Birth City:	Sharnwood Forest
*Birth State or Province:	Greater London	*Birth Country:	GBR United Kingdom
*Sex:	<input checked="" type="radio"/> Male <input type="radio"/> Female	*Marital Status:	Single
*Country of Citizenship:	GBR United Kingdom	*Country of Residence:	GBR United Kingdom
*Visa status requested at Stanford:		Exchange Visitor(J-1)	
Visa Expiration details / Permanent Resident Number, if applicable:			

PROCESS:

NO REVIEW OF ETHNICITY OR ADDRESS DATA

Ethnicity data does not require Admin review

▼ Ethnicity Information

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

Address data does not require Admin review

▼ Personal Addresses

*Email address: robinhood90@gmail.com

Current Mailing Address

*Address Line 1:	1234 Forest Glen Lane			*City:	Sherwood Forest
Address Line 2:				Zip Code:	SE10 9JG
State/Province:	Greater London	*Country:	GBR United Kingdom		
Phone:	123/555-1212	Valid Through Date:			

Permanent/Home Mailing Address

*Address Line 1:	1234 Forest Glen Lane			*City:	Sherwood Forest
Address Line 2:				Zip code:	SE10 9JG
State/Province:	Greater London	*Country:	GBR United Kingdom		
Phone:	123/555-1212	Valid Through Date:			

PROCESS:

REVIEW OUTSIDE FUNDING DETAILS

- If Candidate selects “Yes”:
 - A Notice of Award or Funding Letter must be uploaded



▼ Funding Details

*Will you be receiving outside funding? ☒ No ☐ Yes

PROCESS: REVIEW EDUCATION DETAILS

- **Review for missing data or incorrect degree conferral date**
 - compare to conferral date on degree and CV
- Click “View All” if multiple institutions listed

Education Details

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

Previous/Current Institution(s) View All 1 of 1 Last

*Institution ID:	05000894	University of Oxford	*Field of Study:	FOOD SECURITY
*City:	Oxford	*State:	*Country:	GBR United Kingdom
*Degree:	PHD	Doctor of Philosophy	*Degree Conferral Date:	06/15/2016
*Start Date of Attendance:		06/15/2012	*End Date of Attendance:	
		06/15/2017		

Dissertation details of PhD

PhD Faculty Mentor

First Name: Friar

Last Name: Tuck

PhD Dissertation Title: Robbing the Rich to Feed the Poor

PROCESS: REVIEW WORK EXPERIENCE

CLICK “VIEW ALL” IF MULTIPLE INSTITUTIONS – COMPARE DATA TO CV

Robin Hood

Robinhood7490@gmail.com

Education

Sep 2014 – Jun 2019 Doctor of Philosophy, University of Ocksford
“Robbing the Rich to Feed the Poor”
Supervisor: Prof. F. Tuck

Sep 2012 – Jun 2014 Master of Science, University of Ocksford
“Testing Techniques to Rob the Rich to Feed the Poor”
Supervisor: Prof. M. Marion

Research Experience

Jul 2021 – Jun 2022 Plinceton University
Postdoctoral Scholar – Advanced Robbing Techniques
Supervisor: Prof. L. John

Jun 2019 – Jun 2021 University of Ocksford
Postdoctoral Scholar – Robbing and Feeding
Supervisor: Prof. F. Tuck

References

Prof. F. Tuck

Work Experience

Present Occupation: Present Institution/Employer:

Find View 1 of 2 Last

*Position/Title: Postdoc

*Company/Institution: Plinceton University

*City: Plinceton *State: NJ *Country: USA United States

*Primary Work Activity: PdocTrng *Start Date: 07/01/2021 *End Date: 06/30/2022

Prior Experience: 12 Months Prior Research Experience: 12 Months

*Position/Title: Postdoc

*Company/Institution: Ocksford University

*City: Oxford *State: Greater London *Country: GBR United Kingdom

*Primary Work Activity: PdocTrng *Start Date: 06/16/2019 *End Date: 06/15/2021

Prior Experience: 24 Months Prior Research Experience: 24 Months

PROCESS: REVIEW SUPPORTING DOCUMENTS

- Required Supporting Documents That Candidate Must Upload, if available:
 - **Proof of degree**
 - **CV**
 - **Passport** / visa, work authorization (if international)
 - **Notice of Award** or Funding Letter (if outside funded)

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

POLICY:

REVIEW PASSPORT AND WORK AUTHORIZATION DOCUMENTS

- International Scholars must upload a copy of the **bio-demographic passport page**, and any prior US immigration documents (DS-2019s, I-20s, etc.)
 - **J-1 Scholars:** Postdoc Admin submits a **DS-2019 web form** along with the Recommendation Form
 - **F1 OPT Scholars:** Candidate uploads a copy of the **EAD card**, or if not yet issued, a copy of the EAD application/receipt
 - **H-1B visa holders:** Candidate uploads a copy of the **most recent I-797 approval notice**
 - **Permanent Residents:** Candidate uploads a copy of the **Permanent Resident (green card)**
 - **For Postdocs with J-1 visa sponsored by another institution:** Candidate uploads a copy of the **current Academic Training DS-2019**

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

POLICY: REVIEW OUTSIDE FUNDING DOCUMENTS

- Postdocs with outside, direct-pay funding (not paid through Stanford Payroll) must upload a copy of the Notice of Award or Funding Letter
- Funding letters that denote payment in foreign currency must include conversion to USD
 - Postdoc Admin must upload a currency conversion printout to Nolij
 - www.oanda.com is a good resource for currency conversion rates/printouts
- **REMINDER:** *Postdoc Admin must review currency exchange rates every quarter to ensure outside funding meets the required minimum for the duration of the appointment*
 - ***Outside funding that falls below the required minimum must be supplemented up to at least the required minimum by the appointing department / PI***

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

PROCESS: REVIEW OUTSIDE FUNDING DOCUMENTS

- Notice of Award/Outside Funding Letters:
 - Must be **in English**
 - Must be on **agency letterhead**
 - Must be **signed by an official** funding agency representative
 - Must provide **exact award start and end dates**
 - Must state a **specific funding amount** (a funding range is not acceptable)
 - Must **specify use of funds** and a breakdown of any amounts intended for benefits or other coverages beyond the salary amount
 - Must **specify timing of payment** installments and if transferred in foreign currency or US dollars
 - Must provide a **separate letter** for each outside funding source
 - **Must not require postdoc appointment or employment** with other institution

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

PROCESS: FINISH DATA FORM REVIEW

- Action Buttons:
 - Approve – data form is complete and correct
 - Return – data form has errors that Postdoc must correct
 - Decline – use ONLY if Postdoc declines Stanford offer
 - Print – prints copy for PDF or paper file

Work Experience

Present Occupation: Present Institution/Employer:

Find | View All First 1 of 2 Last

*Position/Title: Postdoc

*Company/Institution: Ocksford University

*City: Oxford *State: Greater London *Country: GBR United Kingdom

*Primary Work Activity: PdocTrng *Start Date: 06/16/2017 *End Date: 06/15/2019

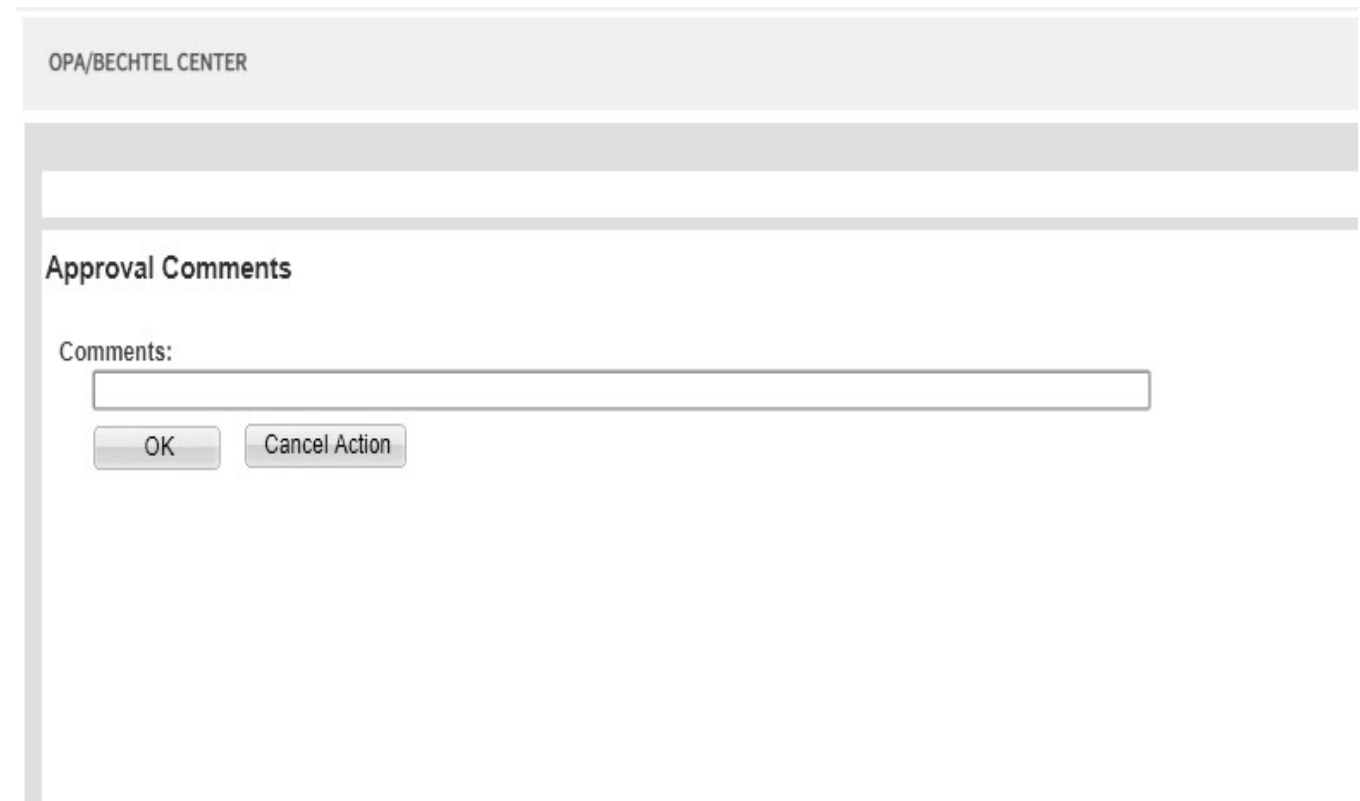
Prior Experience: 24 Months Prior Research Experience: 24 Months

Authorization Agreement ☒

Approve Return Decline Print

PROCESS: ADMIN APPROVAL COMMENTS

- Admin may enter approval comments to document important information, if needed
 - e.g., proof of degree will be provided when available



The screenshot shows a web interface for the OPA/BECHTEL CENTER. At the top, there is a header bar with the text "OPA/BECHTEL CENTER". Below this, there is a section titled "Approval Comments". Under the title, there is a label "Comments:" followed by a large, empty text input field. At the bottom of the form, there are two buttons: "OK" and "Cancel Action".

PROCESS: ADMIN APPROVAL MESSAGE

- **After approval, the Data Form is no longer available in workflow**
- To view an approved Data Form:
 - Create a Recommendation Form
 - Click the “Complete Information Sheet” link
- **Helpful Hint:** Copy the Data Form WF Trans ID number here, for later use with the Recommendation Form

POSTDOCTORAL SCHOLAR APPOINTMENT INFORMATION SHEET

* Required field + Must match passport

Workflow Transaction Information

WF Trans ID: 01731669 Status: **APPROVED** Status Date & Time: 03/11/19 4:49:12PM

Originator: Security Portal PDOC user Email: Phone:

Approval Schedule

Name	Approval Role	Approver Type	Approval Sequence	Transaction Action	Status Date & Time	Comments
1 Kristen Lee	PD-DEPT-ADMIN1	Approver	10	Peer Acted	03/11/2019 4:49:09PM	
2 Tammy Wilson	PD-DEPT-ADMIN1	Approver	10	APPROVED	03/11/2019 4:49:09PM	
3 Alyssa Longoria Esquivel	PD-DEPT-ADMIN1	Approver	10	Peer Acted	03/11/2019 4:49:09PM	
4 Ronda Fenton	PD-DEPT-ADMIN1	Approver	10	Peer Acted	03/11/2019 4:49:09PM	
5 Karen Yang	PD-DEPT-ADMIN1	Approver	10	Peer Acted	03/11/2019 4:49:09PM	
6 Marisa MacAskill	PD-DEPT-ADMIN1	Approver	10	Peer Acted	03/11/2019 4:49:09PM	
7 Kristin Southard	PD-DEPT-ADMIN1	Approver			03/11/2019 4:49:09PM	
8 Kristin Chandler	PD-DEPT-ADMIN1	Approver			03/11/2019 4:49:09PM	

Message

Approval completed. Originator will be notified. (25100,185)

OK

Request

Applicant ID: 40527

Personal Details

*+Last Name: Hood *+First Name: Robin

*+Middle Name: Other Name:

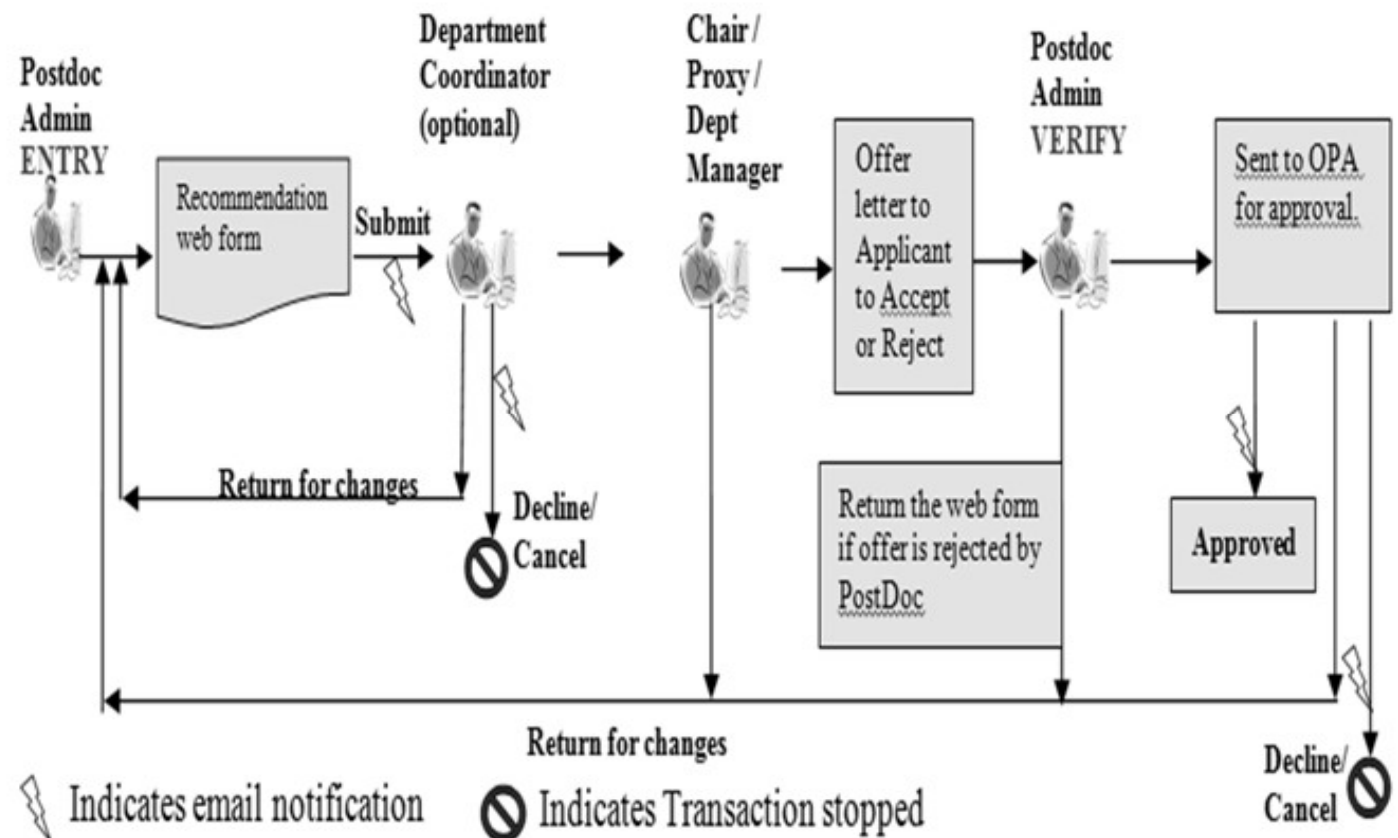
NEW APPOINTMENT:

Postdoc Admin Entry: Create a Recommendation Web Form



PROCESS: RECOMMENDATION FORM IN WORKFLOW

- **Postdoc Admin has two roles** in the Recommendation Form process:
 - Admin **Entry** – *creates* Recommendation Form and *submits* to Department Manager/DFA for approval
 - Admin **Verify** – *reviews* Recommendation Form for errors or late changes in appointment terms and *submits* to OPA for approval



CLICK STEPS: CREATE A RECOMMENDATION FORM

- **Click the Recommendation Form radio button**
- The screen populates with Search boxes
 - **Ignore** the search boxes and the Search button
 - These are used to find EXISTING web forms
- **Click on the ADD button** to create a new Recommendation Form

<https://axess.sahr.stanford.edu/>

OPA/BECHTEL CENTER > POSTDOC ADMINISTRATIVE FORMS

Postdoc Administrative Forms

Postdoctoral Forms

Request type

☒ Recommendation Form
 ☐ Termination Form
 ☐ Change Transactions
 ☐ LOA Form

Postdoctoral Request Type
 First Name
 Last Name
 Academic Program
 Academic Plan
 Academic Sub-Plan
 Transaction Status

CLICK STEPS: TRANSACTION DETAILS BOX

- The Recommendation Form opens
- **“Select Postdoc Data Form” field**
 - Paste the WF Trans ID copied from the Data Form you just approved
 - Tab out of the field
 - The Recommendation Form *partially* populates
- If you did not copy the WF Trans ID:
 - Click the magnifying glass next to the “Select Postdoc Data Form” field
 - Enter Candidate’s first and last names; click Look Up
 - In the Search Results, click Candidate’s Transaction ID
 - The Recommendation Form *partially* populates


Stf Pdocr Rqst Stf Wf Transaction Stf Wf Txn Approvr

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

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

* Required field + Must match passport

Transaction Details

Select PostDoc Data Form: 

Supporting Documents

Save Submit Back Print

CLICK STEPS: TRANSACTION DETAILS BOX

- **“Postdoctoral Request Type” field**
 - We will return to this field on a later slide
- **“Is this request for Department Transfer” field**
 - The default response is “No”
 - Click “Yes” only if Candidate is already a Postdoc at Stanford and is transferring to your department (see next slide)
- Three hyperlinks
 - Comparative Display of Biographic Data
 - This link is not operational
 - Offer Letter
 - Opens the offer letter for review
 - Data entry fields display as blank until data is *entered and saved in the form*
 - Complete Information Sheet
 - Opens the approved Data Form

Stf Pdoc Rqst Stf Wf Transaction Stf Wf Txn Approvr

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

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

* Required field + Must match passport

Transaction Details

Select PostDoc Data Form:

*Postdoctoral Request Type:

Is this request for Department Transfer:

[Comparative Display of Biographic Data](#) [Offer Letter](#) [Complete Information Sheet](#)

Supporting Documents

POLICY: DEPARTMENT TRANSFER

- When a current Stanford Postdoc ends a postdoc appointment in one department and will be appointed as a POSTDOC in another Stanford department
- **IMPORTANT: Terminating and appointing departments must coordinate the transfer to ensure continuation of pay, benefits, ID Card privileges, and visa compliance (for international postdocs); i.e., no gap between termination and new appointment start date**
- **The current department submits a Termination Form**
 - Action Reason is “PDEP - Departmental Transfer”
- **The new department submits a Postdoc Invite and Recommendation Form**
 - CANNOT use the email address used for previous postdoc appointment
 - Is this request for Department Transfer field is YES

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/transfer-another-stanford-department>

CLICK STEPS: TRANSACTION DETAILS BOX

- Action Buttons:
 - Save
 - Saves the form to prevent data loss and to return to finish later
 - Populates offer letter fields for review
 - Submit – sends web form to workflow for approval
 - Back – returns to the Search page
 - Print – prints copy for PDF or paper file
- **Notice the Recommendation Form appears incomplete** – there are no blank fields to enter the appointment terms for your Postdoc Candidate!

Stf Pdoc Rqst Stf Wf Transaction Stf Wf Txn Approvr

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

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

* Required field + Must match passport

Transaction Details

Select PostDoc Data Form:

*Postdoctoral Request Type:

Is this request for Department Transfer:

[Comparative Display of Biographic Data](#) [Offer Letter](#) [Complete Information Sheet](#)

Supporting Documents

Save Submit Back Print

CLICK STEPS: TRANSACTION DETAILS BOX

- To view the full Recommendation Form:
 - Return to the “Postdoctoral Request Type” field and click the down arrow
 - **Select “Clinical” or “Research”**
 - The Request Type determines what questions populate the rest of the form
 - This training covers the Research form
 - A separate Clinical training presentation is available
- Data from the Data Form populates these boxes:
 - Appointee Information
 - Department Applied
 - Education Details

Stf Pdocr Rqst	Stf Wf Transaction	Stf Wf Txn Approvr
Recommendation Form to appoint Postdoctoral Research Scholars/Clinical Fellows (Trainees)		
<p>The following information is required for processing the Postdoctoral Scholar appointment, benefits enrollment, visa petition requests, SEVIS database management, & other appointment processes.</p> <p>* Required field + Must match passport</p>		
Transaction Details		
Select PostDoc Data Form:		<input type="text" value="01731669"/>
*Postdoctoral Request Type:		<input type="text" value="Research"/>
Is this request for Department Transfer:		<input type="text" value="No"/>
Comparative Display of Biographic Data		Offer Letter
Complete Information Sheet		
Appointee Information		
Last Name:	Hood	First Name: Robin
Date of Birth:	07/04/1990	Middle Name:

CLICK STEPS VIDEO: TRANSACTION DETAILS BOX

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Stanford University

AXESS

UAT2

MY
AXESS

GFS
CENTER

EMPLOYEE
CENTER

ADMIN
RESOURCES

WORKFLOW
HOME

OPA/BECHTEL
CENTER

STARS

CS
Admin

A
Fa

Workflow Home

Workflow Home

0My Approvals

0My Pending Requests

0My

My Approvals

EMPLOYEE EXTERNAL LINKS

Administrative Guide

Benefits

Faculty & Staff Help Center

Parking & Transportation Services

Stanford Accounts

Stanford Directory

StanfordYou

University Human Resources

University IT

ACADEMIC EXTERNAL LINKS

Explore Courses

Order IT

Financial Aid Office

Student Services Center

Explore Degrees

Registrar's Office

Housing and Dining

Vaden Health Center

AXESS HELP

Help Ticket

Tips for Using Axxess

Report Accessibility Issues

CLICK STEPS: ACADEMIC INFORMATION BOX

- For Academic Information fields to populate properly, data must be entered from left to right, in this order:
 - **Academic Career**
 - **Academic Program**
 - **Academic Plan**
 - **Academic Sub-Plan (if any)**
 - **Other Stanford Association (if any)**

The screenshot shows two forms. The first form, 'Academic Information', has fields for *Academic Career, *Academic Program, *Academic Plan, Academic Sub-Plan, and Other Stanford Associations. Arrows indicate the sequence: Academic Career to Academic Program, Academic Program to Academic Sub-Plan, and Academic Plan to Academic Sub-Plan. The second form, 'Appointment Information', contains various fields and questions related to the appointment, including dates, research experience, and patient contact.

Academic Information

*Academic Career: → *Academic Program:

*Academic Plan: → Academic Sub-Plan:

Other Stanford Associations:

Appointment Information

*Area of Research/Training - Position description:
Complete this sentence for the offer letter: "During this appointment, you will be involved in..."

*Appointment Start Date: *Offer Letter date:

*Appointment End Date:

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

Will the postdoc work in a laboratory? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

Research Experience since last conferral date: 36 Months

Research Experience, noted by department: Months

If the post doctoral scholar has an MD, will he or she have patient contact? ☐ Yes ☒ No

Additional Information regarding Patient Contact:

CLICK STEPS: ACADEMIC INFORMATION BOX

- **“Academic Career” field**
 - Click the magnifying glass to Look Up
 - All University departments: (non-School of Medicine)
 - Enter “GR”
 - School of Medicine departments:
 - Enter “GR” or “MED”
 - If unsure check with your OPA manager
 - GSB and LAW departments:
 - Check with your OPA manager
- **Real World Training Scenario:**
 - Robin’s career is “GR”

The screenshot shows the 'Academic Information' section of a form. The 'Academic Career' field is circled, and a magnifying glass icon is next to it. A search overlay titled 'Look Up *Academic Career' is open, showing search results for 'GR'. The results table is circled.

Academic Career	Description
GR	Graduate
GSB	Graduate School of Business
LAW	Law
MED	Medicine
UG	Undergraduate

CLICK STEPS: ACADEMIC INFORMATION BOX

- **“Academic Program” field**
 - Click the magnifying glass to Look Up
 - Select the home department of the appointing Faculty Sponsor
 - ***If unsure, DO NOT guess***
 - Check with your OPA manager
- ***Real World Training Scenario:***
 - Prof Lobell’s home department is Earth Systems Science
 - Robin’s program is Earth Systems Science (ESS)

The screenshot shows the 'Academic Information' section of a form. The 'Look Up *Academic Program' dialog is open, displaying search results for 'ESS' (Earth System Science). The 'Academic Program' field in the background is circled in red.

Academic Information

*Academic Career: GR Graduate

*Academic Program:

*Academic Plan:

Academic Sub-Plan:

Other Stanford Associations:

Look Up *Academic Program

Academic Institution: STANF

Academic Career: GR

Academic Program: begins with

Description: begins with E

[Basic Lookup](#)

Search Results

View 100 First 1-16 of 16 Last

Academic Program	Description
ESS	Earth System Science
EASIS	Earth Systems
EEES	Earth, Energy & Environ Science
EASST	East Asian Studies

Appointment Information

*Area of Research/Training - Position description:

Complete this sentence for the offer letter: "During this appointment"

*Appointment Start Date:

*Appointment End Date:

Will the postdoctoral scholar conduct research outside of Stanford?

Will the postdoc work in a laboratory?

Is this a joint appointment Instructor/Clinical Instructor?

Research Experience since last conferral date:

CLICK STEPS: ACADEMIC INFORMATION BOX

- **“Academic Plan” field**
 - Click the magnifying glass to Look Up
 - The Plan will show “No Results” if a Program is not entered
- **“Academic Sub-Plan” field**
 - Used only for a few Plans in the School of Medicine
 - If unsure check with your OPA manager
- **Real World Training Scenario:**
 - Robin’s plan is ESS-PD
 - ESS does not have a sub-plan

The screenshot shows the 'Academic Information' section of a form. The 'Academic Career' is set to 'GR' (Graduate) and the 'Academic Program' is set to 'ESS' (Earth System Science). The 'Academic Plan' field is empty and circled in red. The 'Academic Sub-Plan' field is also empty. Below these fields is a 'Look Up *Academic Plan' dialog box. The dialog box has fields for 'Academic Institution' (STANF), 'Academic Plan' (begins with), and 'Description' (begins with). Below these fields are buttons for 'Look Up', 'Clear', 'Cancel', and 'Basic Lookup'. Below the dialog box is a 'Search Results' section with a table showing the results of the search. The table has columns for 'Academic Program', 'Academic Plan', and 'Description'. The results show 'ESS', 'ESS-PD', and 'Earth System Science (PD)'. The 'ESS-PD' and 'Earth System Science (PD)' rows are circled in red.

Academic Program	Academic Plan	Description
ESS	ESS-PD	Earth System Science (PD)

CLICK STEPS: ACADEMIC INFORMATION BOX

- “**Other Stanford Associations**” field
 - Used *only* by **non-degree granting programs**
 - e.g., Freeman-Spogli Institute, Dean of Research units, SLAC, BioDesign, etc.
 - If appointing a Postdoc in a non-degree granting program:
 - Click the magnifying glass to Look Up
 - ***If unsure, DO NOT guess***
 - Check with your OPA manager
- ***Real World Training Scenario:***
 - Robin’s Other Association is the Center on Food Security and the Environment

The screenshot shows the 'Academic Information' section of a form. The 'Other Stanford Associations' field is circled in black. A 'Look Up' dialog box is open, showing search results for 'fsi'. The results table is as follows:

Association	Description
002	FSI-Center for Democracy, Development, and the Rule of Law
005	FSI-Center for Health Policy
003	FSI-Center for International Security and Cooperation
009	FSI-Center on Food Security and the Environment
008	FSI Program on Energy and Sustainable Development
010	FSI-Rural Education Action Program
006	FSI-The Europe Center
004	FSI-Walter H. Shorenstein Asia-Pacific Research Center

The entry '009 FSI-Center on Food Security and the Environment' is circled in black in the search results.

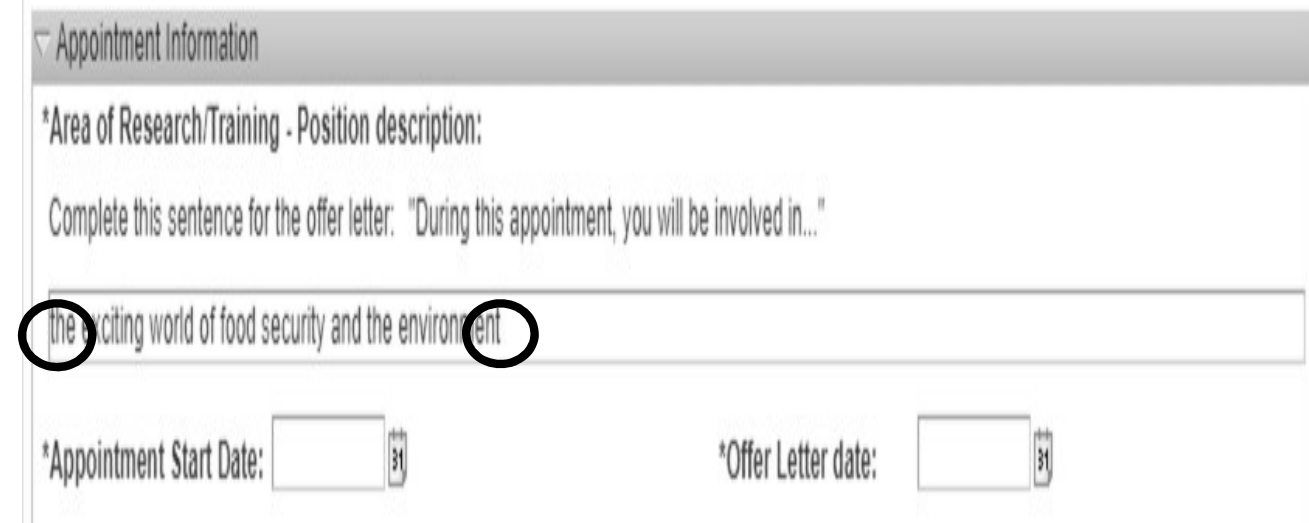
CLICK STEPS VIDEO: ACADEMIC INFORMATION BOX

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Appointee Information					
Last Name:	Hood	First Name:	Robin	Middle Name:	
Date of Birth:	07/04/1990				
Department Applied					
*Dept ID:	INSTINTLST	Institute for Intl Studies			
*Faculty Sponsor ID:	05144732	David Lobell	Phone:	Email Addr:	pscs-dev-emails@stanford.edu
*Research Mentor ID:			Phone:	Email Addr:	
Education Details					
Find View All First 1 of 1 Last					
Institution ID:	05000894	University of Oxford	Field of Study:	FOOD SECURITY	
City:	Oxford	State:	Country:	GBR United Kingdom	
Degree:	PHD	Doctor of Philosophy	Degree Date:	06/15/2016	
Start Date:	06/15/2011		End Date:	06/15/2016	
Academic Information					
*Academic Career:	<input type="text"/>	*Academic Program:	<input type="text"/>		
*Academic Plan:	<input type="text"/>	Academic Sub-Plan:	<input type="text"/>		
Other Stanford Associations:	<input type="text"/>				

CLICK STEPS: APPOINTMENT INFORMATION BOX

- “Area of Research/Training – Position Description” field
 - Enter a brief description of the training or research the postdoc will be doing
 - Text entered in this field feeds into the middle of a sentence in the offer letter
 - **DO NOT CAPITALIZE THE FIRST LETTER OF THE TEXT YOU ENTER**
 - **DO NOT TYPE A PERIOD AT THE END OF THE TEXT YOU ENTER**
- **Real World Training Scenario:**
 - Robin’s area of research is “the exciting world of food security and the environment”



The screenshot shows a web form titled "Appointment Information". It contains a text input field for the "Area of Research/Training - Position description". Below the field, a prompt reads: "Complete this sentence for the offer letter: 'During this appointment, you will be involved in...'". The text "the exciting world of food security and the environment" is entered in the field. Two black circles are drawn around the first 't' and the final 't' of the entered text. At the bottom, there are two date pickers: "*Appointment Start Date:" and "*Offer Letter date:", each with a calendar icon.

CLICK STEPS: APPOINTMENT INFORMATION BOX

- Offer Letter View
 - Text entered in the “Area of Research/Training – Position Description” field populates mid-sentence

Professor David Lobell
FSI-Center on Food Security and the Environment
Stanford University
Stanford, CA 94305

Robin Hood
1234 Forest Glen Lane
Sherwood Forest, Greater London SE10 9JG GBR

Dear Dr. Hood:

I am pleased to offer you an appointment as a Postdoctoral Scholar in FSI-Center on Food Security and the Environment. This letter is intended to document our understanding of your appointment.

During this appointment, you will be involved in the exciting world of food security and the environment. Your initial appointment will begin on September 1, 2019, and end on August 31, 2020. Your total support for the initial year of training will be \$60,000.00 plus certain medical, dental, vision, and life insurance coverage through Stanford's postdoctoral scholar programs. The source of your funding will be from U.S.; Professor Lobell's Research Grant.

CLICK STEPS: APPOINTMENT INFORMATION BOX

- **“Appointment Start Date” field**
 - Enter the requested appointment start date
- **“Appointment End Date” field**
 - Enter the requested appointment end date
- **“Offer Letter Date” field**
 - Enter the intended offer letter date
- **Real World Training Scenario:**
 - Robin’s appointment dates:
 - Start date: 09/01/22
 - End date: 08/31/23
 - Offer letter date: 07/01/22

Appointment Information

*Area of Research/Training - Position description:

Complete this sentence for the offer letter: "During this appointment, you will be involved in..."

the exciting world of food security and the environment

*Appointment Start Date: 09/01/2022

*Offer Letter date: 07/01/2022

*Appointment End Date: 08/31/2023

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

Will the postdoc work in a laboratory? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

CLICK STEPS: APPOINTMENT INFORMATION BOX

- **“Will the postdoctoral scholar conduct research outside of Stanford University Campus?” field**
 - The default response is “No”
 - Click “Yes” if any research will be conducted off campus
 - List the location(s) and date(s) of off-campus research
 - *Postdoc Benefits must be notified if the postdoc will work outside of the benefit plan service area*
- **Real World Training Scenario Details:**
 - Robin will conduct research in Tanzania from 01/05/23-02/28/23

Appointment Information

*Area of Research/Training - Position description:
Complete this sentence for the offer letter: "During this appointment, you will be involved in..."
the exciting world of food security and the environment

*Appointment Start Date: 09/01/2022 *Offer Letter date: 07/01/2022

*Appointment End Date: 08/31/2023

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

If yes, list location(s): Tanzania; 01/05/23 – 02/28/23

Will the postdoc work in a laboratory? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

Research Experience since last conferral date: 36 Months

Research Experience, noted by department: Months



If the post doctoral scholar has an MD, will he or she have patient contact? ☐ Yes ☒ No


CLICK STEPS: APPOINTMENT INFORMATION BOX

- **“Will the postdoc work in a laboratory?” field**
 - The default response is “No”
 - Click “Yes” if Postdoc will work in a lab
 - A “Yes” response creates a new question
 - “Is this a biosciences lab?”
 - Click “Yes” or “No”, as appropriate
- **“Is this a joint appointment Instructor/Clinical Instructor” field**
 - School of Medicine use only
 - The default response is “No”
 - Click “Yes” for joint instructor/clinical instructor appointments
- **Real World Training Scenario:**
 - Robin will work in a lab
 - Not a biosciences lab
 - Robin is not a joint clinical instructor

Appointment Information

*Area of Research/Training - Position description:
Complete this sentence for the offer letter: "During this appointment, you will be involved in..."
the exciting world of food security and the environment

*Appointment Start Date: 09/01/2022  *Offer Letter date: 07/01/2022 

*Appointment End Date: 08/31/2023 

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

If yes, list location(s): Tanzania; 01/05/23 – 02/28/23

Will the postdoc work in a laboratory? ☒ Yes ☐ No

Is this a biosciences lab? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

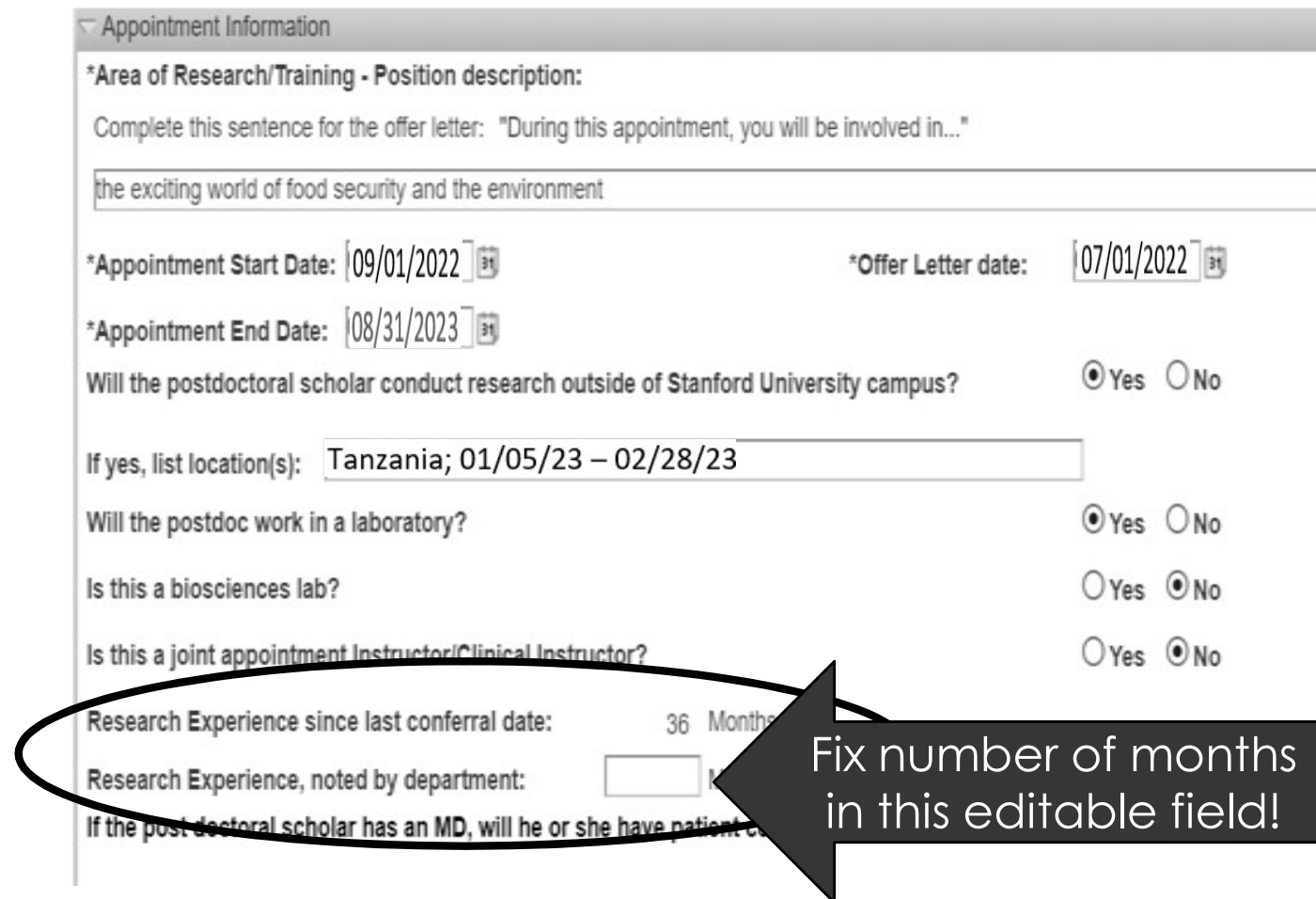
Research Experience since last conferral date: 36 Months

Research Experience, noted by department: Months

If the post doctoral scholar has an MD, will he or she have patient contact? ☐ Yes ☒ No

CLICK STEPS: APPOINTMENT INFORMATION BOX

- **“Research Experience since last conferral date” field**
 - This number is system-calculated based on the Work Experience entered in the Data Form
- **“Research Experience noted by department” field**
 - This is an editable field the Postdoc Admin will use to confirm or revise the system calculation, as appropriate



The screenshot shows the 'Appointment Information' form. At the bottom, the field 'Research Experience since last conferral date:' is circled in black. A large black arrow points from the text 'Fix number of months in this editable field!' to this circled field. The field currently displays '36 Months'.

Appointment Information

*Area of Research/Training - Position description:
Complete this sentence for the offer letter: "During this appointment, you will be involved in..."
the exciting world of food security and the environment

*Appointment Start Date: [09/01/2022] [31] *Offer Letter date: [07/01/2022] [31]

*Appointment End Date: [08/31/2023] [31]

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

If yes, list location(s): Tanzania; 01/05/23 – 02/28/23

Will the postdoc work in a laboratory? ☒ Yes ☐ No

Is this a biosciences lab? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

Research Experience since last conferral date: 36 Months

Research Experience, noted by department: []

If the post-doctoral scholar has an MD, will he or she have patient care responsibilities? ☐ Yes ☒ No



CLICK STEPS: APPOINTMENT INFORMATION BOX


If Candidate Has NO Previous Research Experience

- Be sure the “Research Experience noted by department” editable field shows “zero”

Appointment Information

*Area of Research/Training - Position description:
Complete this sentence for the offer letter: "During this appointment, you will be involved in..."
the exciting world of food security and the environment

*Appointment Start Date: 09/01/2022  *Offer Letter date: 07/01/2022 

*Appointment End Date: 08/31/2023 

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

If yes, list location(s): Tanzania; 01/05/23 – 02/28/23

Will the postdoc work in a laboratory? ☒ Yes ☐ No

Is this a biosciences lab? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

Research Experience since last conferral date: 36 Months

Research Experience, noted by department: Months

If the post doctoral scholar has an MD, will he or she have patient contact? ☐ Yes ☒ No

CLICK STEPS: APPOINTMENT INFORMATION BOX

If Candidate HAS Previous Research Experience

- **Compare the System calculation to your Research Experience Calculator total**
 - Do the number of months match?
 - Yes - enter that number in the editable field
 - No - Is the difference due to discounted time?
 - Yes - Enter the discounted number
 - No - Review the CV, Data Form Work Experience, and Research Calculator to find the discrepancy
 - NOTE: Web form rounds up; calculator rounds down, creates a one month discrepancy
 - Enter correct number of months in editable field
- **The number of months entered in the editable field must match the Research Experience Calculator combined total months**
- **Real World Training Scenario:**
 - Robin's research experience is discounted from 36 to 24 months

Research experience was calculated for Robin Hood based on data submitted in the Postdoc Research Experience Calculator form.

If revisions are needed, the totals noted below will change and a new Totals email will be sent.

Combined Previous Research Experience (from all previous appts): 24

****For new appts: enter this number on the Recommendation web form in the Research Experience noted by Department field.****

Is this a joint appointment Instructor/Clinical Instructor?

☐ Yes ☒ No

Research Experience since last conferral date: 36 Months

Research Experience, noted by department: 24 Months

If the post doctoral scholar has an MD, will he or she have patient contact?

Fix Data Here,
if needed!

CLICK STEPS: APPOINTMENT INFORMATION BOX

- **If you are unsure about the research experience calculation, contact your OPA Manager for assistance**
- Why is the Research Experience Calculation important?
 - Recommendation Form will be returned for revision if Research Experience is incorrect
 - Prior research experience reduces the length of time Candidate can be a postdoc at Stanford

CLICK STEPS: APPOINTMENT INFORMATION BOX

- **“If the post doctoral scholar has an MD, will he or she have patient contact” field**
 - School of Medicine use only
 - Default response is “No”
 - Click “Yes” if SOM Postdoc will have patient contact
- **“Additional Information regarding Patient Contact” field**
 - Add any additional details regarding patient contact

Appointment Information

*Area of Research/Training - Position description:
Complete this sentence for the offer letter: "During this appointment, you will be involved in..."
the exciting world of food security and the environment

*Appointment Start Date: 09/01/2022 31 *Offer Letter date: 07/01/2022 31

*Appointment End Date: 08/31/2023 31

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

If yes, list location(s): Tanzania; 01/05/23 – 02/28/23

Will the postdoc work in a laboratory? ☒ Yes ☐ No

Is this a biosciences lab? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

Research Experience since last conferral date: 36 Months

Research Experience, noted by department: 24 Months

If the post doctoral scholar has an MD, will he or she have patient contact? ☐ Yes ☒ No

Additional Information regarding Patient Contact:

CLICK STEPS: APPOINTMENT INFORMATION BOX

- **“Additional details regarding this appointment to be included in offer letter” field**
 - Creates a new paragraph in the Offer Letter
 - Use for additional terms and details not addressed in the standard offer letter text
 - Examples:
 - Complex funding details
 - Details of Postdoc Pay-All Insurance terms
 - Reimbursement of moving expenses
 - Provision of travel or other non-salary funds
 - Added text may not alter standard offer letter, and must be in accordance with both postdoctoral and University policies
- **Real World Training Scenario:**
 - Prof Lobell has agreed to reimburse Robin’s relocation expenses up to \$2,500
 - Robin is required to teach a one quarter class as part of his postdoctoral training

Research Experience, noted by department: 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

Your moving expenses are reimbursable up to \$2,500 against actual receipts. You are required to teach a one quarter undergraduate class during the course of this one year appointment.

CLICK STEPS: APPOINTMENT INFORMATION BOX

- View of the new paragraph added to the offer letter
 - Do not enter the period at the end of the final sentence; will create a double period at the end of the paragraph

Robin Hood
1234 Forest Glen Lane
Sherwood Forest, Greater London SE10 9JG GBR

Dear Dr. Hood:

I am pleased to offer you an appointment as a Postdoctoral Scholar in FSI-Center on Food Security and the Environment. This letter is intended to document our understanding of your appointment.

During this appointment, you will be involved in the exciting world of food security and the environment. Your initial appointment will begin on September 1, 2022 and end August 31, 2023. . Your total support for the initial year of training will be \$68,238 plus certain medical, dental, vision, and life insurance coverage through Stanford's postdoctoral scholar programs. The source of your funding will be from U.S.; Professor Lobell's Research Grant.

Your moving expenses are reimbursable up to \$2,500 against actual receipts. You are required to teach a one quarter undergraduate class during the course of this one year appointment.

Prior Postdoctoral Research: Stanford has a five-year postdoctoral term limit policy that includes most prior postdoctoral experience. Your prior postdoctoral research experience, calculated in months from your submitted information, was reported as: 24.

CLICK STEPS VIDEO: APPOINTMENT INFORMATION BOX ¹²¹

Other Elements

Appointment Information

***Area of Research/Training - Position description:**
Complete this sentence for the offer letter: "During this appointment, you will be involved in..."

*Appointment Start Date: 31 *Offer Letter date: 31

*Appointment End Date: 31

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

Will the postdoc work in a laboratory? ☐ Yes ☒ No

Is this a joint appointment Instructor/Clinical Instructor? ☐ Yes ☒ No

Research Experience since last conferral date: 36 Months

Research Experience, noted by department: 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

POLICY: FUNDING DETAILS BOX

- **Types of Funding**

- Salary paid through Stanford (entered on “New Salary” line)
- Stipend paid through Stanford (entered on “New Stipend” line)
- Outside funding, direct-pay to postdoc (entered on “New outside support” line)
 - Examples of Outside Funding
 - Home country government
 - Educational institution
 - Fellowship funding
 - Stanford Hospital (SUH)
 - Palo Alto Veterans Institute for Research (PAVIR)
- Funding can be from one or more sources, and in any suitable combination of types
- The Recommendation Form calculates the minimum annual funding rate
- The total pay from all sources must meet the minimum annual rate
- Personal and family funds are not permitted

<https://postdocs.stanford.edu/funding-guidelines>

POLICY: FUNDING DETAILS BOX

- Minimum funding levels are established by the University annually
 - Based on inflation and local consumer price index
- New minimum funding levels are published in spring quarter and are effective on September 1 of each year
- Funding levels for each postdoc must be reviewed annually
 - Minimum funding must be updated each September 1 while the appointment is active

<https://postdocs.stanford.edu/funding-guidelines>

POLICY:

SALARY AND STIPEND - KEY DISTINCTIONS

Salary

- Pay for work performed
- **ALLOWABLE** on research grants/contracts
- Subject to employment rules, tax withholding
 - Receives W-2 form
- Fringe Benefits Rate automatically incurred for 20 hours salary or more
 - 25.1% in FY21

Stipend

- Living allowance for research
- **NOT ALLOWED** on research grants/contracts
 - Except Training Grants, Fellowships
- Receives letter from Payroll for taxes
- Not permitted for postdocs in H-1B (employment) visa status

Correction from one funding type to another can be very painful. Work with your department's Research, Grants, and Financial Administrators to determine the correct type of support before making GFS entries

PROCESS: FUNDING DETAILS BOX

- **Funding MUST be entered as an annual rate**, even when the appointment term is more or less than one year
- The Recommendation Form will calculate the “Required Salary” based on the current minimum annual funding requirement
- The “Total Annual Amount” must meet or exceed the “Required Salary” amount

▼ Funding Details

Please enter the funding amount and a description of funding sources supporting this postdoctoral appointee. Reminder: the text you enter in the description field(s) will be added to the Offer Letter. To verify the minimum funding required and other Stanford policies regarding funding, check: http://postdocs.stanford.edu/admin/how-to/paying_postdocs.html.

The description(s) entered below will be added to the offer letter after: "The source of your funding will be from..."

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

<input type="text" value="Prof Lobell's Research Grant"/>	Annual Amount:	<input type="text" value="\$68,238"/>
---	----------------	---------------------------------------

New Stipend / Fellowship support paid through Stanford University - Description

<input type="text"/>	Annual Amount:	<input type="text"/>
----------------------	----------------	----------------------

New Outside support with direct payment to fellow - Description

<input type="text"/>	Annual Amount:	<input type="text"/>
----------------------	----------------	----------------------

Required Salary: \$68,238 Total Annual Amount: \$68,238

CLICK STEPS: FUNDING DETAILS BOX

- Provide these funding details:
 - Source/Fellowship Name
 - Dates of Funding
 - If different from appointment dates
- Example format:
 - Wallenberg Fellowship; 5/1/22-4/30/23
 - John Doe Gift Funds; 10/01/22-09/30/23
- **Real World Training Scenario:**
 - Enter Robin's funding:
 - Description: Prof Lobell's Research Grant; 09/01/22-08/31/23
 - Annual Amount: \$68,238

Funding Details

Please enter the funding amount and a description of funding sources supporting this postdoctoral appointee. Reminder: the text you enter in the description field(s) will be added to the Offer Letter. To verify the minimum funding required and other Stanford policies regarding funding, check: http://postdocs.stanford.edu/admin/how-to-paying_postdocs.html.

The description(s) entered below will be added to the offer letter after: "The source of your funding will be from..."

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

Prof Lobell's Research Grant	Annual Amount:	\$68,238
------------------------------	----------------	----------

New Stipend / Fellowship support paid through Stanford University - Description

	Annual Amount:	
--	----------------	--

New Outside support with direct payment to fellow - Description

	Annual Amount:	
--	----------------	--

Required Salary: **\$68,238** Total Annual Amount: **\$68,238**

CLICK STEPS: VISA DETAILS BOX

- For International Scholars only:
 - Click the “Visa Type” field
 - From the drop-down list, select the correct visa status
 - If the correct visa status is not listed, select any status and note the correct visa status in the “Notes to Approver” field
- **Real World Training Scenario:**
 - Robin’s visa status is J-1

The screenshot shows a web form titled "Visa Details". It includes a section for "Department Administrator" with fields for Admin, Phone, and Email Address. Below this is a "Supporting Documents" section with a "Browse..." button and an "Upload" button. At the bottom is a "Preview and Certification" section with a "Preview Offer Letter" link and a checkbox for certification. A callout arrow points from the "Visa Type" dropdown menu to the "Notes to approver" text area.

Visa Details

If the appointee is not a US citizen or Permanent Resident, you must indicate his/her visa status requested. Check the Information Sheet link above for details regarding your appointee immigration status in the United States.

*Visa Type:

Department Administrator

Admin: 06707079 Tammy Wilson

Phone: 650/380-1283 Email Addr: tjwilson@stanford.edu

Supporting Documents

Browse... No file selected. Upload

Preview and Certification

[Preview Offer Letter](#) -- (Must click "Save" first)

☐ I certify that I reviewed the Offer letter in its entirety by checking the letter language for accuracy, flow and correct inclusion of other data from this form.

Notes to approver

Save Submit Back Print

CLICK STEPS: PREVIEW OFFER LETTER AND NOTES TO APPROVER

- **“Preview Offer Letter” link**
 - Click the Save button at the bottom
 - Click the “Preview Offer Letter” link
 - Review for proper grammar, punctuation, and word flow where entered text populates the offer letter
 - Revise data entry fields to correct word flow, punctuation, etc., if needed
- **“Notes to Approver” field** can be used to:
 - Request policy exceptions
 - Explain unusual appointment terms to OPA
 - Notify OPA of existing Student ID number
 - Notify OPA of erroneous data on the Data Form to be corrected

The screenshot shows a web form titled "Preview and Certification". At the top, there is a link "Preview Offer Letter -- (Must click 'Save' first)" which is circled in black. Below this link is a checkbox with the text "I certify that I reviewed the Offer letter in its entirety by checking the letter language for accuracy, flow and correct inclusion of other data from this form." Below the checkbox is a text area labeled "Notes to approver" which is also circled in black. The text area contains the text "Requesting a policy exception for PhD conferred more than 3 years ago. Previous research is within term limits." At the bottom of the form, there are four buttons: "Save", "Submit", "Back", and "Print". The "Save" button is circled in black.

CLICK STEPS: SUBMISSION TO WORKFLOW

- **Click the “I certify...” check box**
- **Action Buttons**
 - Save – Saves data entered in form
 - Submit – Submits to workflow for Role #3 Department Manager/ DFA approval
 - Back – Returns to previous screen
 - Print – Prints a copy for PDF or paper file
- ***Real World Training Scenario:***
 - Robin’s PhD was conferred more than 3 years ago
 - Request a policy exception
 - Click Submit to send form to Workflow

The screenshot shows a web form titled "Preview and Certification". At the top, it says "Preview Offer Letter -- (Must click 'Save' first)". Below this is a checkbox labeled "I certify that I reviewed the Offer letter in its entirety by checking the letter language for accuracy, flow and correct inclusion of other data from this form." This checkbox is circled in black. Below the checkbox is a text area labeled "Notes to approver" containing the text "Requesting a policy exception for PhD conferred more than 3 years ago. Previous research is within term limits." This text area is also circled in black. At the bottom of the form are four buttons: "Save", "Submit", "Back", and "Print". The "Submit" button is circled in black.

CLICK STEPS VIDEO: FUNDING, VISA DETAILS BOXES

Funding Details

Please enter the funding amount and a description of funding sources supporting this postdoctoral appointee. Reminder: the text you enter in the description field(s) will be added to the Offer Letter. To verify the minimum funding required and other Stanford policies regarding funding, check: http://postdocs.stanford.edu/admin/how-to/paying_postdocs.html.

The description(s) entered below will be added to the offer letter after: "The source of your funding will be from..."

New Salary Paid through Stanford University, entered in GFS - Description	Annual Amount:
<input type="text"/>	<input type="text"/>
New Stipend / Fellowship support paid through Stanford University - Description	Annual Amount:
<input type="text"/>	<input type="text"/>
New Outside support with direct payment to fellow - Description	Annual Amount:
<input type="text"/>	<input type="text"/>

Required Salary: 60000.00 Total Annual Amount:

Visa Details

If the appointee is not a US citizen or Permanent Resident, you must indicate his/her visa status requested. Check the Information Sheet link above for details regarding your appointee immigration status in the United States.

*Visa Type:

Department Administrator

Admin:	05707079	Tammy Wilson	
Phone:	650/380-1283	Email Addr:	pscs-dev-emails@stanford.edu

Supporting Documents

PROCESS: ROLE #3 APPROVER RECEIVES EMAIL NOTICE

From: workflow@psprcuat30.stanford.edu <workflow@psprcuat30.stanford.edu>

Sent: Friday, March 6, 2020 10:14 AM

To: pdwebtesting@stanford.edu

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

A Recommendation request for the following postdoctoral scholar has been submitted for your review and approval.

LAST NAME: Hood

FIRST NAME: Robin

TRANSACTION ID: 01829752

Please log into AXESS (<https://axess.stanford.edu/>) and click on the "OPA/Bechtel Center" tab on the top bar which will open the workflow where you can review this request.

PROCESS:

ROLE #3 APPROVER REVIEWS RECOMMENDATION FORM

Role# 3 Approver Reviews Recommendation Form

- Approver can:
 - **Approve – generates the offer letter**
 - Return – to Postdoc Admin for revisions
 - Decline – ends the appointment process
 - Decline only if candidate rejects Stanford offer

When Role# 3 clicks “Approve”, the Offer Letter is sent to Postdoc

Department Administrator Contact

Admin:	05707079	Tammy Wilson
Phone:	650/380-1283	Email Addr: pscs-dev-emails@stanford.edu

Notes to approver

Requesting a policy exception for PhD conferral more than 3 years ago. Previous research is within policy limits.

Approve Return Decline Print

PROCESS:

ROLE #3 APPROVAL TRIGGERS EMAILS

Approval email to Faculty Sponsor

From: workflow@psprcuat30.stanford.edu <workflow@psprcuat30.stanford.edu>
 Sent: Friday, March 6, 2020 10:14 AM
 To: pdwebtesting@stanford.edu
 Subject: Test message: Recommendation Request with transaction 01829752 for Robin Hood has been Submitted.

[This is a system-generated message. Please do not reply to this message.]

Dear Professor David Lobell,

This is a system generated notification that Tammy Wilson has submitted a recommendation on your behalf to appoint Robin Hood as a postdoctoral scholar in Institute for Intl Studies. Upon approval by the Department, your prospective postdoc will receive an email notification 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, Robin Hood will be involved in the exciting world of food security and the environment. The initial appointment will begin on September 1, 2020 and end on August 31, 2021. The total support for the initial year of training will be \$63,000, plus certain medical, dental, vision and life insurance coverage through Stanford's Postdoctoral Scholar programs. This appointment may be terminated prior to the anticipated end date noted above based upon loss of funding, change in programmatic need or unsatisfactory performance on your postdoc's part. Effective on October 1 of each year, the funding support may change in order to meet the university's stipend salary levels of support for postdoctoral scholars in a given academic year. At the end of this initial appointment and subject to the term limits set forth in Research Policy Handbook 9.4 and the Postdoc Handbook, this appointment may be eligible for renewal, based on satisfactory performance, the existence of funding, and programmatic need.

The source of funding will be U.S., Prof Lobell's Research Grant; 09/01/20-08/31/21. At this time or during the term of this appointment, if the postdoc will receive other funding to support the training at Stanford, the postdoc is required to provide a copy of the funding letter to the Office of Postdoctoral Affairs and to you. Receiving external support towards postdoctoral training at Stanford may alter the amount of funding offered to the postdoc from Stanford or other sources, or the responsibilities associated with this appointment.

Postdoctoral Scholars are required to attend a mandatory Postdoctoral Benefits Session upon their arrival at Stanford. Tammy Wilson will enroll your postdoc prior to the start of the appointment. Stanford provides a range of health and other benefits to all postdoctoral scholars. In order to secure health care coverage through the Stanford plans, the postdoc must enroll within the first 31 days of the appointment start date. Postdocs who are paid a "salary" by Stanford may save for your retirement by contributing to Stanford's Tax Deferred Annuity Plan. Postdoc benefits information and policy is available at <http://benefits.stanford.edu/postdocs>.

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 15 calendar days of absence due to illness per year; and paid maternity leave of up to six weeks. In addition, your postdoc may be eligible for family and medical leave. Please refer to the Research Policy Handbook 9.4 and the Postdoc Handbook for more details. Any leave policy must be acceptable to outside funding agencies.

Email to candidate to review offer letter

From: workflow@psprcuat30.stanford.edu <workflow@psprcuat30.stanford.edu>
 Sent: Friday, March 6, 2020 10:14 AM
 To: pdwebtesting@stanford.edu
 Subject: Test message: Recommendation Sheet with transaction ID #:01829752

Dear Robin Hood,

Institute for Intl Studies 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 letter. Your online acceptance is required for the completed paperwork to be submitted to the University for final review and approval.

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

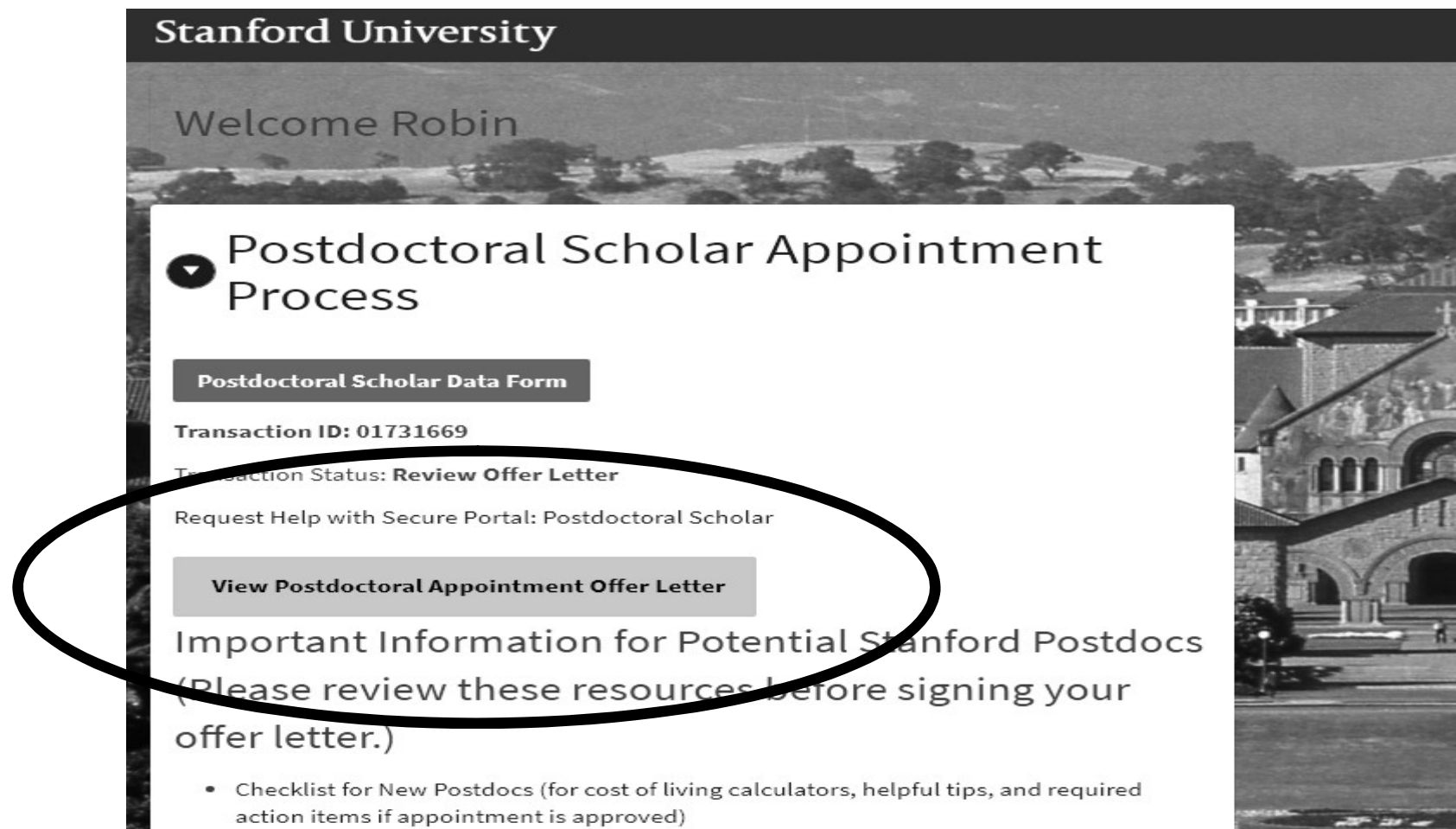
Best wishes,
 Tammy Wilson

NEW APPOINTMENT

Postdoc Candidate's View of Offer Letter



PROCESS: POSTDOC CANDIDATE RETURNS TO SECURE PORTAL



PROCESS: CANDIDATE'S VIEW OF THE OFFER LETTER

Robin Hood
1234 Forest Glen Lane
Sherwood Forest, Greater London SE10 9JG GBR

Dear Dr. Hood:

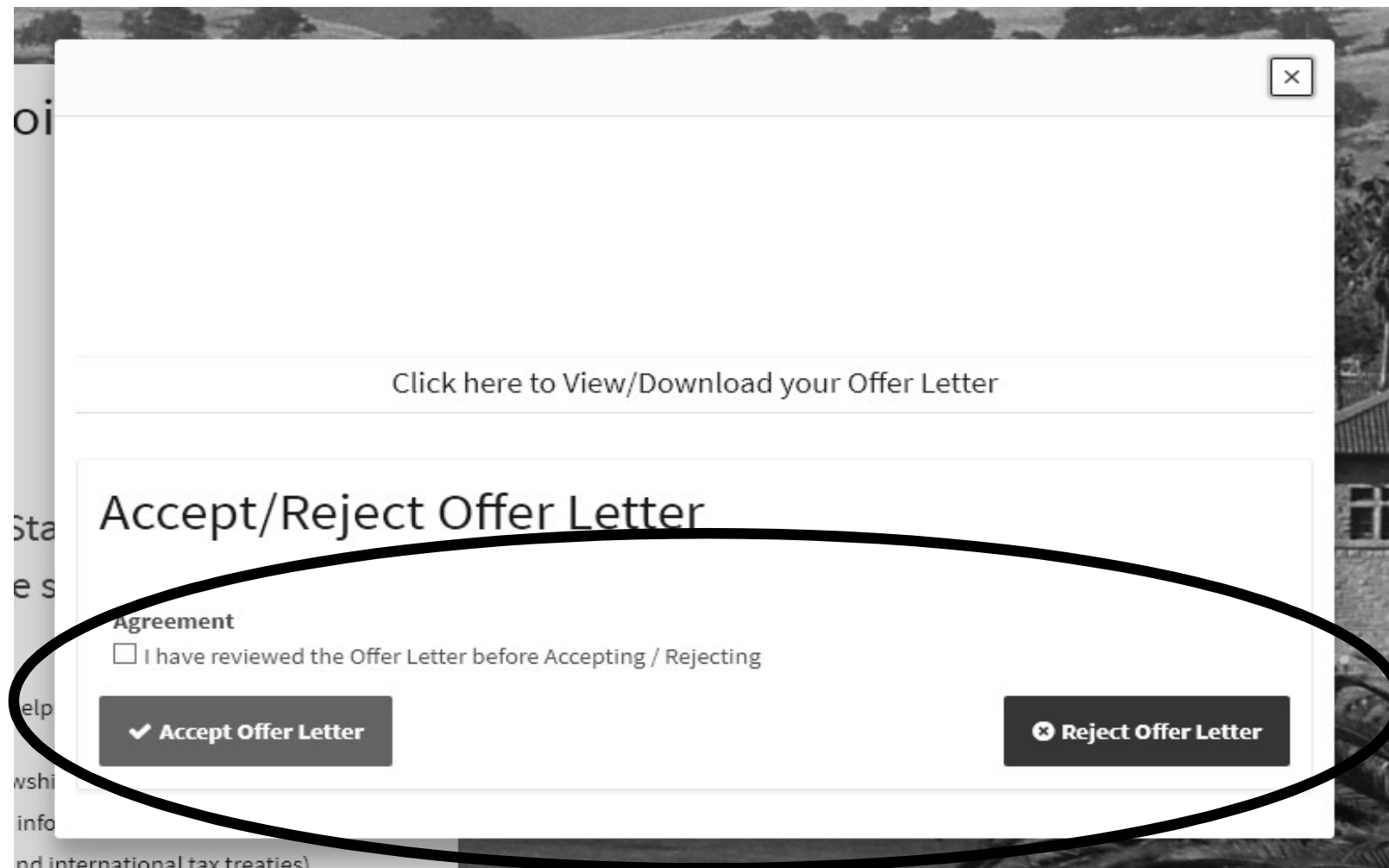
I am pleased to offer you an appointment as a Postdoctoral Scholar in FSI-Center on Food Security and the Environment. This letter is intended to document our understanding of your appointment.

During this appointment, you will be involved in the exciting world of food security and the environment. Your initial appointment will begin September 1, 2022 and end August 31, 2023. Your total support for the initial year of training will be \$68,238 plus certain medical, dental, vision, and life insurance coverage through Stanford's postdoctoral scholar programs. The source of your funding will be from U.S.; Professor Lobell's Research Grant.

Your moving expenses are reimbursable up to \$2,500 against actual receipts. You are required to teach a one quarter undergraduate class during the course of this one year appointment.

Prior Postdoctoral Research: Stanford has a five-year postdoctoral term limit policy that includes most prior postdoctoral experience. Your prior postdoctoral research experience, calculated in months from your submitted information, was reported as: 24.

PROCESS: CANDIDATE ACCEPTS OR REJECTS THE OFFER LETTER



oi

Click here to View/Download your Offer Letter

Sta
e s

Accept/Reject Offer Letter

Agreement

☐ I have reviewed the Offer Letter before Accepting / Rejecting

elp

wshi

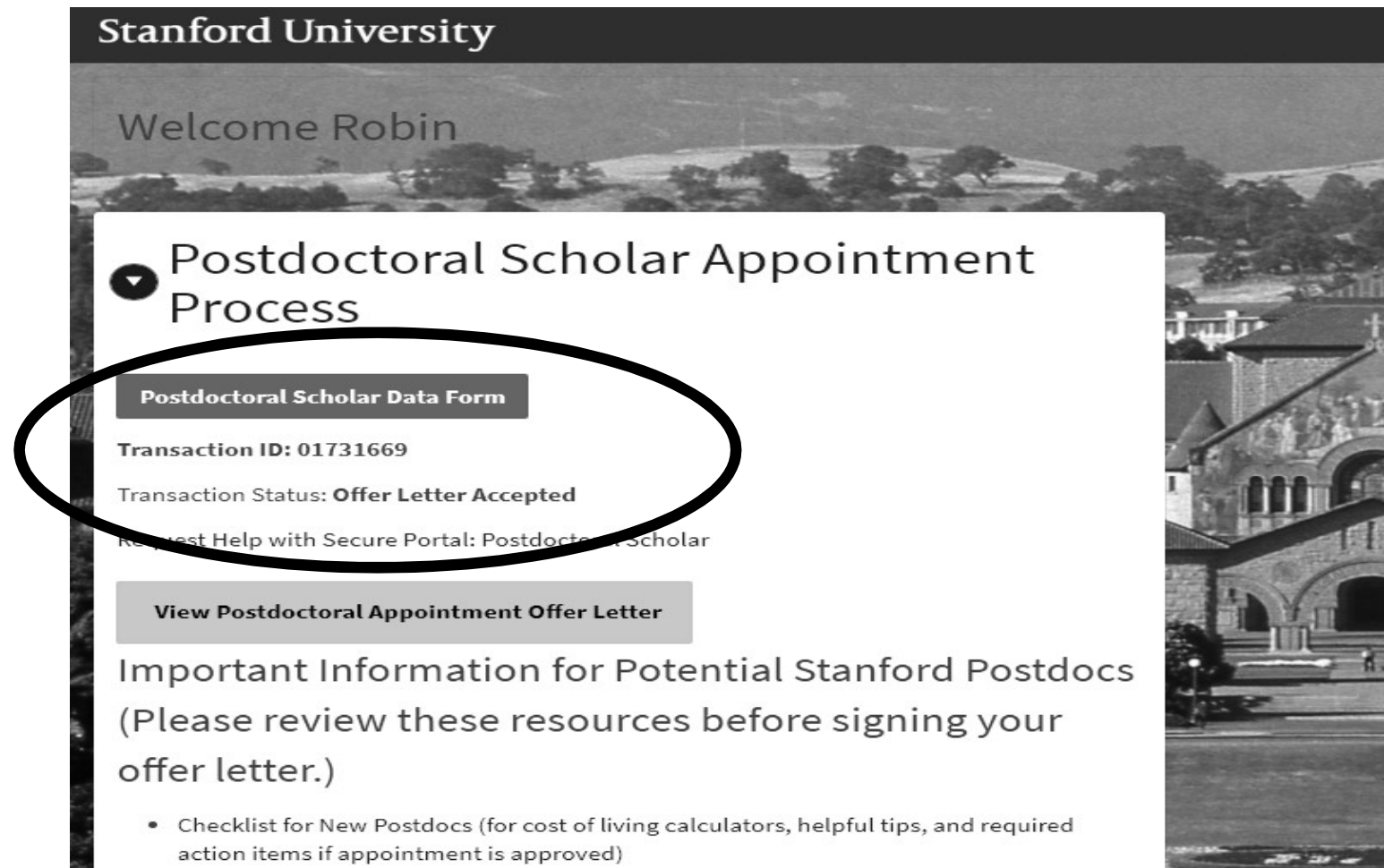
info

nd international tax treaties)

✓ Accept Offer Letter

✗ Reject Offer Letter

PROCESS: CONFIRMATION OF OFFER STATUS



Stanford University

Welcome Robin

Postdoctoral Scholar Appointment Process

Postdoctoral Scholar Data Form

Transaction ID: 01731669

Transaction Status: **Offer Letter Accepted**

Request Help with Secure Portal: Postdoctoral Scholar

View Postdoctoral Appointment Offer Letter

Important Information for Potential Stanford Postdocs
(Please review these resources before signing your offer letter.)

- Checklist for New Postdocs (for cost of living calculators, helpful tips, and required action items if appointment is approved)

PROCESS: OFFER ACCEPTANCE NOTICES

Email Notice to Postdoc Confirming Offer Acceptance

From: workflow@psprcuat30.stanford.edu <workflow@psprcuat30.stanford.edu>
Sent: Friday, March 6, 2020 10:14 AM
To: pdwebtesting@stanford.edu
Subject: Test message: Offer letter has been accepted for transaction ID # 01829752.

Dear Robin Hood:

Thank you for accepting your offer of a 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.

Questions regarding your appointment and upcoming transition to Stanford may be directed to your departmental administrator Tammy Wilson at pscs-dev-emails@stanford.edu.

Email Notice to Admin of Postdoc Acceptance

From: workflow@psprcuat30.stanford.edu <workflow@psprcuat30.stanford.edu>
Sent: Friday, March 6, 2020 10:14 AM
To: pdwebtesting@stanford.edu
Subject: Test message: Offer letter has been accepted for transaction ID # 01829752.

Invited postdoc Robin Hood has accepted their offer letter in SecurePortal.

Please log into AXESS (<https://axess.stanford.edu/>) and click on the "OPA/Bechtel Center" tab on the top bar which will open the workflow where you can review this request.

Please Note: The Office of Postdoctoral Affairs does not receive the appointment paperwork until after you have completed this final review and submission step.

NEW APPOINTMENT

Postdoc Admin Verify: Submit the Recommendation Web Form



PROCESS: RETURN TO WORKFLOW TO VERIFY AND SUBMIT TO OPA

- **Admin MUST return to workflow for final Verify to:**

- Confirm appointment terms are accurate
- Confirm all required supporting documents are uploaded
- Submit to workflow

- **HELPFUL HINT:**

- **A DISABLED/GREYED OUT “APPROVE” BUTTON** indicates the Postdoc has NOT accepted the online Offer Letter
- Appointment cannot proceed until Postdoc accepts the Offer Letter

<https://axess.sahr.stanford.edu/>

15	Tammy Wilson	PD-OPA-ADMIN1	Approver	40	-	01/18/2019 2:00:23PM	Returned for additional screen shots :)
16	Sofie Kleppner	PD-OPA-ADMIN1	Approver	40	-	01/18/2019 9:10:34AM	
17	Rashmi Moran	PD-OPA-ADMIN1	Approver	40	-	01/18/2019 9:10:34AM	

Approve

Return

Decline

Print

Post Doc Transaction Details

*Select PostDoc Information sheet: 01731669

*Postdoctoral Request Type PostDoc Research Scholars

Is this request for Department Transfer: No

Comparative Display of Biographic Data

Offer Letter

Complete Information Sheet

Appointee Information

Last Name: Hood

First Name: Robin

Middle Name:

Date of Birth:

Department of appointment

PROCESS: **HOLD IT! ARE ALL REQUIRED DOCUMENTS UPLOADED?**

**DO NOT SUBMIT TO OPA UNTIL ALL
REQUIRED DOCUMENTS ARE UPLOADED!**

- **Documents Uploaded by Candidate**

- Doctoral diploma or Letter of Completion
- Current CV
- If International:
 - Passport AND:
 - EAD Card or application (if F1 OPT)
 - Green Card (if Permanent Resident)
 - I-797 Approval Notice (if H-1B status)
 - Copy of DS-2019 (if sponsored by other institution)
- Outside Funding Letter(s) (if applicable)

**If a document is missing:
HOLD the web form in your workflow
until you receive and upload it.**

- **Documents Uploaded by Postdoc Admin**

- Any Candidate documents not available when Data Form was submitted
- Research Experience Calculator (if previous research experience)
- Currency Conversion printout (if foreign currency noted in outside funding letter)
- Outside funded benefits coverage approval email (if applicable)

CLICK STEPS: SUBMIT THE RECOMMEND FORM

- **If all required supporting documents are uploaded, click Approve**
- Approval comments can be added

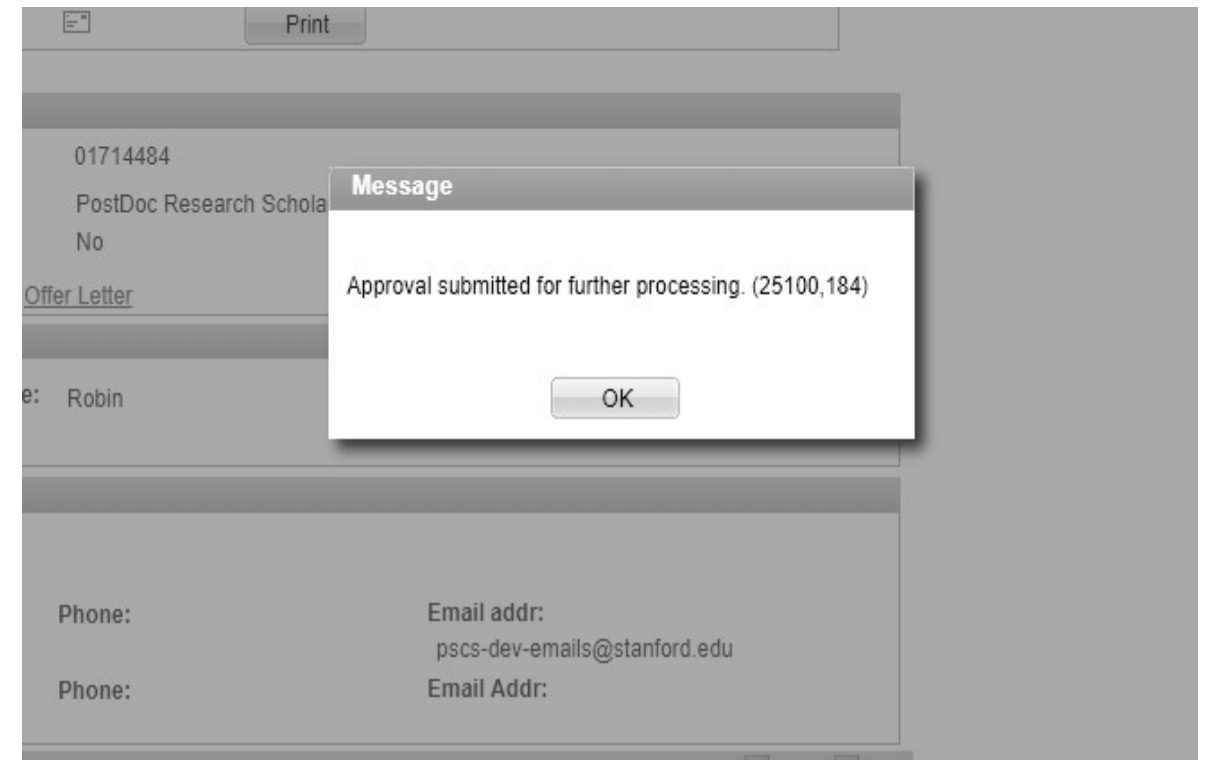


OPA/BECHTEL CENTER

Approval Comments

Comments:

Confirmation of Submission



Print

01714484

PostDoc Research Schola

No

[Offer Letter](#)

e: Robin

Phone:

Phone:

Email addr:

pacs-dev-emails@stanford.edu

Email Addr:

Message

Approval submitted for further processing. (25100,184)

PROCESS: OPA APPROVAL NOTICES

Approval Notice to Admin

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

Approved By: Shannon Monahan

00791323 has been approved by Shannon Monahan

Type of Request: PostDoc Research Scholars

LAST NAME: Hood

FIRST NAME: Robin

TRANSACTION ID: 01731691

Comments:

Approval Notice to Postdoc

From: workflow@psprcuat20.stanford.edu
 To: postdocaffairs@stanford.edu
 Cc:
 Subject: Test message: Recommendation sheet has been approved. Sent: Tue 8/2/2011 5:45

Dear Dr. Annie Rannie:

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

Your Online Postdoctoral Orientation:

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

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

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

Questions? Submit a HelpSU Ticket at <http://helpsu.stanford.edu>. Request Category: Student Services. Request Type: Postdoctoral Affairs

PROCESS:

COMMON REASONS OPA WILL RETURN WEB FORM OR DELAY APPROVAL

- **Recommendation Form Returned to Postdoc Admin for Revision:**
 - Faculty Sponsor is not eligible to appoint a Postdoc
 - Incorrect Career, Program, Plan, Sub-plan, or Other Association
 - Postdoc Candidate is not eligible (appointment or employment elsewhere; more than 5 years postdoctoral research experience, etc.)
 - Appointment start date not feasible (e.g., timeline too short for visa processing)
 - Incorrect Research Experience noted by department
 - Additional details added to offer letter that are contrary to Postdoc Policy
 - Incorrect Funding
 - Amount listed is not the annual rate (appointment period is more or less than one year and funding is prorated for appointment period rather than annual rate)
 - Annual amount includes extra allowances, benefits costs, or other non-salary amounts
- **Recommendation Form remains pending in OPA workflow until issue resolved:**
 - Insufficient proof of degree (letter of completion does not meet requirements)
 - Missing one or more required supporting documents
 - Appointment dates/funding are mismatched with visa dates/funding

CLICK STEPS:

RETURNED RECOMMENDATION FORM

- **What happens if appointment terms change after the Recommendation Form is submitted to workflow?**
- Check AXESS to see where the Recommendation Form is pending
 - Contact the pending Approver to return the web form for revisions
- Postdoc Admin returns web form to Self
 - If the web form is pending Admin's verify in workflow, Admin clicks Return, then:
 - Mouse over the OPA/Bechtel tab
 - Click Postdoc Administrative Forms
 - Click Recommendation Form button
 - Search by Postdoc name
 - Click the transaction ID, open form
 - Make revisions, save, and resubmit

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

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

* Required field + Must match passport

Workflow Transaction Information			
WF Trans ID: 00791323	Status: PENDING	Status Date & Time: 08/02/11 4:57:52PM	
Originator: Ransome,Annelies Ashoff	Email: pscs-dev-emails@stanford.edu	Phone: 650/736-0129	

Approval Schedule						
	Name	Approval Role	Approver Type	Approval Sequence	Transaction Action	Status Date & Time
1	Rania Sanford	PD-CHAIR-PROXY-DFA	Approver	10	APPROVED	08/02/2011 4:57:52PM
2	Alistair Murray	PD-CHAIR-PROXY-DFA	Approver	10	Peer Acted	08/02/2011 4:57:52PM
3	Annelies Ransome	PD-DEPT-ADMIN-VERIFY	Approver	20	PENDING	08/02/2011 4:57:52PM
4	Shannon Monahan	PD-CHAIR-ADMIN	Approver	30		

Approve	Return	Decline		Print	Back to Workflow Home
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Post Doc Transaction Details	
*Select PostDoc Information sheet	00791322
*Postdoctoral Request Type	PostDoc Research Scholars
Is this request for Department Transfer:	No
Comparative Display of Biographic Data	Offer Letter
	Complete Information Sheet

PROCESS: DELAY OF APPOINTMENT DATA LOAD TO PEOPLESOFT

- The Email Notice of Appointment Approval Does Not Mean that Appointment Data is Uploaded to PeopleSoft
 - **There may be a 24-48 hour delay (longer during high volume processing periods) AFTER the approval notice before the appointment data is uploaded to PeopleSoft**
 - To check if the appointment is active in PeopleSoft, log-in and look for the student ID number (see the next slide)

CLICK STEPS:

LOOK UP STUDENT ID IN POSTDOC WEB FORMS

- In AXESS, mouse over the OPA/Bechtel Center tab
- Click Postdoc Administrative Forms
- Click Change Request, then click **Add**
- Click magnifying glass to Look Up


- Enter Postdoc names in search fields, click Look Up
- Copy the Empl ID#; cancel and exit
- If "No Results", the appointment data is not yet loaded to PeopleSoft

Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

☐ Appointment dates change ☐ Faculty change ☐ Funding change ☐ Research Experience / PGY change

▼ Bio Demo

*Student ID: 

DeptID: Appointment Start Date:

Academic Program: Appointment End Date:

Academic Plan: Months Research Prior to Appt: 0

Academic Sub-Plan: Months of Current Appointment: 0

Appointment Type: US Citizenship Status:


Faculty Sponsor: Visa/Permit Type:

Research Mentor: Visa End Date:

Salary: \$0.00 Recommendation Form ID:

Post Graduate Year (PGY):

Additional Information regarding forms:

*Student ID: 

DeptID: Appointment Start Date:

Academic Program: Appointment End Date:

Academic Plan: Months Research Prior to Appt: 0

Academic Sub-Plan: Months of Current Appointment: 0

Appointment Type: US Citizenship Status:

Faculty Sponsor: Visa/Permit Type:

Research Mentor: Visa End Date:

Salary: \$0.00 Recommendation Form ID:

Post Graduate Year (PGY):

Look Up *Student ID

Empl ID: begins with

Last Name: begins with hood

First Name: begins with robin

Academic Program: begins with

Academic Plan: begins with

Academic Sub-Plan: begins with

Look Up **Clear** **Cancel** [Basic Lookup](#)

Search Results

View 100

Empl ID	Last Name	First Name	Academic Career	Student Career Nbr	Academic Program	Academic Program
06340421	Hood	Robin	Graduate	0	ESS	Earth System

NEW APPOINTMENT

Postdoc Admin: Visas for International Scholars



POLICY: VISA TYPES FOR INTERNATIONAL POSTDOCS

- **J-1 Scholar (with DS-2019 document)**
 - Expected visa status for Stanford Postdocs
 - J-1 visa status available up to a maximum total of 5 years
- **F-1 Optional Practical Training (OPT) with Employment Authorization (EAD) card**
 - International Postdocs who were graduate students in the US may start their postdoctoral appointment in F-1 OPT status for the period of the EAD work authorization up to 12 months
 - 24 months additional time may be available with a STEM extension in selected research fields, then transfer to J-1 or H-1B visa status
- **H-1B Visa**
 - Postdoc must meet eligibility criteria and be approved for this visa policy exception
 - H-1B visa status available up to a maximum of 6 years

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/request-visas-postdoctoral-scholars>

PROCESS: SUBMISSION OF J-1 / VISA DS-2019 REQUESTS

- Admin completes J-1/H-1B visa training with Bechtel International Center
- Admin submits J-1 / DS-2019 SEVIS Visa Request web form
- Funding is required to cover duration of visa and appointment
- Submit DS-2019 and Recommendation web forms **at least 8 weeks** before expected Postdoc arrival / appointment start date
 - 3 months in advance is preferred
- **OPA CANNOT approve visa web forms without an accompanying Recommendation Form**

POLICY:

J-1 VISA DS-2019 PROCESSING GUIDELINES

- **Appointment start and end dates must match** DS-2019 program start and end dates
- **DS-2019 funding total must match annual funding reported to OPA, EXCEPT:**
 - When appointment/DS-2019 program do not equal one year
 - Report to OPA: Annual funding amount
 - Report to Bechtel: Funding amount for program period
 - When external funding includes allowances beyond the annual funding amount
 - Report to OPA: Annual funding amount; do not include allowances
 - Report to Bechtel: Funding amount for program period; okay to include allowances
- **Recommendation and DS-2019 Web Forms** are submitted concurrently to OPA

<https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars>

POLICY: CONDITIONAL J-1 VISA DS-2019 APPROVAL GUIDELINES

- To facilitate visa processing for international scholars, OPA may review for a conditional DS-2019 approval in advance of the appointment approval, with:
 - Written request from department, by email or Notes to Approver entry
 - Letter of Completion must provide a statement of progress toward degree
 - Letter must provide an anticipated date of degree conferral
 - **If proof of degree is not provided on or before the postdoc appointment start date:**
 - The appointment CANNOT start; Postdoc Admin must delay the start date, OR
 - The Candidate must be appointed as a Visiting Student Researcher (VSR) or other appropriate status until proof of degree is provided
 - Information on Visiting Student Researcher status can be found at:
 - [GAP policy \(Section 1.3\)](#); [RPH policy](#); [Registrar's Office page](#)
- Conditional approval of the DS-2019 is NOT available when the PhD institution has an extended dissertation evaluation process

PROCESS:

F1 OPT AND H-1B VISA

- **F1 OPT with an Employment Authorization (EAD) Card**

- Postdoc applies for EAD Card
 - Stanford is not involved in process
- Postdoc uploads to the Data Form a copy of the EAD card (if available)
- Appointment can be approved with a copy of the EAD application or receipt if the card isn't available when Postdoc submits Data Form
 - Postdoc Admin uploads EAD card when available later

- **H-1B Visa**

- Requires an approved policy exception by OPA or the H-1B Review Board
- Postdoc must meet specific H-1B visa eligibility criteria
- Postdoc must be paid salary
 - Stipend and fellowship is NOT permitted
- More complex processing required
- More expensive for department
- Conveys other responsibilities to PI
- H-1B Visa Process, Guidelines, and Required Documents

NEW APPOINTMENT

Postdoc Admin: Salary and Stipend



PROCESS: PAYING POSTDOCS

- Postdocs are paid through Graduate Financial Support (GFS)
- **GFS Mail Code is where the pay stub is sent** for stipend-paid postdocs and where the paycheck is sent (if direct deposit is not yet set up)
- Postdocs should sign-up for direct deposit as soon as possible after 1st paycheck is issued
- Postdocs can't change where checks are sent by changing the mailing address
 - Live pay checks are sent to the GFS mail code location
 - They must contact their GFS Administrator to change the GFS mail code
- **Postdocs MUST check AXESS to ensure they have a local mailing address listed**
 - SEVIS requires international postdocs to list their foreign address as home address
 - If no local mailing address is listed the W2 document will be sent to the home address (outside of U.S. for international scholars)
- Review Gateway to Financial Activities:
 - http://web.stanford.edu/group/fms/fingate/staff/payadmin/payadmin_student.html

PROCESS: PAYING POSTDOCS

- **OPA's responsibilities:**

- Create Student ID (Empl ID)
- Term Activation in PeopleSoft Student Administration
- Set up a Benellogic record

- **Department responsibilities:**

- Benellogic entry of PTAs to charge insurance premiums
- Item-Type Requests for New PTAs, if needed
- Entry of GFS Salary, Stipend, Outside Funding lines, as applicable
- Collection of I-9 documents and forwarding to Payroll
 - Follow-up with postdoc on missing I-9 documentation

POLICY: PAYING POSTDOCS

- **Department is responsible for:**
 - Determining type and level of funding
 - Following University policies and funding source requirements
 - Meeting minimum funding requirements
- **Rules, regulations and restrictions regarding source of support:**
 - Funding source may prohibit support from other sources
 - Funding source may require US citizens or Permanent Residents
- **Funding sources must be coordinated:**
 - Postdoc and staff must understand and follow requirements of each funding source
 - Work closely with your grants and research financial administrators
 - Consult trained colleagues; review financial policies

PROCESS: PAYING POSTDOCS

- Postdoctoral Scholars Funding Types:
 - **Stanford Funding**
 - Grants, contracts, training grants, school/departmental funds, etc.
 - Paid as **salary (semi-monthly) or stipend (monthly)**, depending on the funding
 - **Outside Support (external fellowships)**
 - Paid directly from outside source to postdoc
 - Must be tracked in GFS for auditing purposes
- Any combination of funding sources is permitted

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/pay-postdocs>

POLICY:

FRINGE BENEFITS RATES ASSESSED ON SALARY

- **Assistantship Type - RAF or RAFC - controls the benefit rate**
- **Full Postdoc Fringe Benefit Rate (25.3% for FY22)**
 - Charged to all salary entries with Assist Type RAF – when salary accounts for at least 50% of total compensation (at least 20 hours salary)
 - e.g., two separate salary lines, one 12 hours and one 18 hours will be charged the full benefits rate
- **Contingent Benefit Rate (7.9% for FY22)**
 - Charged to all salary entries with Assist Type RAFC – when salary accounts for less than 50% of total compensation (less than 20 hours salary)
 - e.g., one salary line for 10 hours (25% of total compensation) will be charged the contingent benefits rate

POLICY:

ANNUAL 9/1 MINIMUM FUNDING INCREASE

- All postdocs must be at the appropriate pay level
 - Departments must review their postdoc salaries/stipends/outside funding on an annual basis and confirm that their scholars are funded at least the minimum required rate on 09/01/xx
 - GFS must be updated with increase.
 - Funding Guidelines

POLICY:

ANNUAL 9/1 MINIMUM FUNDING INCREASE

- **Postdocs on External, Direct-Pay Funding**
 - Upload to Nolij a copy of the award letter
 - Outside funding is entered in GFS for audit purposes only
 - Foreign currencies must be converted to US dollars
 - www.oanda.com is a good resource for currency exchange rates
 - **REMINDER:** Double-check every quarter that currency exchange rates haven't caused a postdoc to fall below funding minimums
 - Foreign funding must be supplemented by department when fluctuation in currency exchange results in a funding shortfall below the required minimum
- **Postdocs on Unpaid Leave of Absence**
 - Apply the appropriate salary rate when postdoc returns from leave

NEW APPOINTMENT

Postdoc Admin: Postdoc Benefits



POLICY: POSTDOC BENEFITS

- A postdoctoral appointment at Stanford includes certain defined benefits for medical, dental, vision, disability, and leave benefits
- Defined benefits established by the Postdoc Benefits office **may not be modified or diminished** by individual agreement between the postdoc and the appointing department or faculty sponsor
- Postdoc Benefits are managed via a third-party platform, Benelogic
 - Information on training and access to Benelogic is [here](#)

POLICY: POSTDOC BENEFITS FUNDING

- Stanford's portion of postdocs' benefits costs are paid from:
 - The automatic application of a fringe benefits rate on salaries of at least 50% FTE, which are paid to the postdoc through GFS, OR
 - From departmental or faculty funds, in the absence of a 50% FTE level of salary support
 - In rare cases, benefits costs are paid from fellowship funding specifically allocated for the postdoc's insurance premium costs

POLICY:

POSTDOC BENEFITS SESSION

- Benefits session is mandatory for all new Postdoctoral Scholars
- Postdoc Admin registers incoming Postdocs for the first session following their arrival at Stanford
- Go to [Postdoc Benefits](#) for sessions dates, times, and location
- Email postdocbenefits@stanford.edu with Benefits questions
- Benefits coverage enrollment is not approved until Postdoc has attended session
- Postdocs must make benefits elections within 30 days of the appointment start date or will default into basic coverage

POLICY: 2022 MONTHLY CONTRIBUTION RATES

- *Institutional costs are funded from a variety of sources depending on each individual Postdoc's appointment arrangement
- **Upon enrollment, eligible family members (spouse,/registered domestic partner and children through age 25, regardless of student or marital status) are automatically covered.
- <https://stanford.app.box.com/s/8iabjanys7wgaykqkbbvwmsgcpp8ckh6>

2022 MONTHLY CONTRIBUTION RATES

	2022 Monthly Premiums		
	Total Cost	Institutional Cost*	Your Monthly Cost
Medical – Stanford Health Care Alliance (SHCA)			
Postdoc Only	\$822.70	\$822.70	\$0.00
Postdoc + Spouse/Registered Domestic Partner	\$1,675.83	\$1,424.45	\$251.38
Postdoc + Child(ren)	\$1,346.76	\$1,144.74	\$202.02
Postdoc + Family	\$2,333.99	\$1,983.89	\$350.10
Dental – Delta Dental PPO			
Postdoc Only	\$41.42	\$41.42	\$0.00
Postdoc + Spouse/Registered Domestic Partner	\$81.42	\$41.42	\$40.00
Postdoc + Child(ren)	\$71.42	\$41.42	\$30.00
Postdoc + Family	\$111.42	\$41.42	\$70.00
Vision – Vision Service Plan (VSP)			
Postdoc Only	\$8.47	\$8.47	\$0.00
Postdoc + Spouse/Registered Domestic Partner	\$14.28	\$8.47	\$5.81
Postdoc + Child(ren)	\$14.61	\$8.47	\$6.14
Postdoc + Family	\$24.38	\$8.47	\$15.91
Extended Travel Assistance – Assist America, Inc.			
Postdoc + Eligible Family Members**	\$1.25	\$0.00	\$1.25
Disability, Life and AD&D – Standard Insurance Company			
Short-Term Disability	\$15.50	\$15.50	\$0.00
Long-Term Disability	\$1.83	\$1.83	\$0.00
Basic Life	\$2.50	\$2.50	\$0.00
Basic Accidental Death & Dismemberment	\$0.88	\$0.88	\$0.00
Postdoc Assistance Program (PAP) – Aetna Resources For Living			
Postdoc + Household Members	\$1.54	\$1.54	\$0.00

* Institutional costs are funded from a variety of sources depending on each individual postdoc's appointment arrangement.

** Once you enroll, your eligible family members (spouse/registered domestic partner and children under age 26, regardless of student or marital status) are automatically covered.

POLICY: WAIVING STANFORD BENEFITS COVERAGE

- **Postdocs who have an outside health plan may request a review to waive Stanford Benefits**
 - Requires proof of other comprehensive medical coverage
 - Usually from a working spouse
 - Travel policies do not offer comprehensive coverage
- Outside health plans must substantially meet ACA minimum requirements for approval
- The outside plan must be approved by the Postdoc Benefits office **prior to** appointment approval
- Admin must upload a PDF copy of the Benefits approval email to Nolij

<https://postdocbenefits.stanford.edu/eligibility-enrollment/waiving-stanfords-medical-insurance>

POLICY EXCEPTION: POSTDOC PAY-ALL

- **Some outside funding agencies provide funds above and beyond the annual stipend specifically for health benefits charges**
- In these cases, funds may be used to cover the Institutional (department) portion of the health insurance premiums (see Postdoc Health Premiums Rate Sheet)
- The department **MUST** make a formal request to OPA (Postdoc Pay All Job Aid)
- **Pre-Approval Required!** The formal request **MUST** be submitted for review *prior to the Recommendation Form submission* to avoid the department having to pay for the insurance from a guarantee account if the exception is not approved
- Because this is an exception to policy, no arrangements will be recognized until reviewed and approved by the OPA Benefits Office
- If approved, Admin must upload a PDF copy of the Benefits approval email to Nolij

INDIVIDUAL DEVELOPMENT PLAN (IDP)

Meetings and Reports



POLICY: INDIVIDUAL DEVELOPMENT PLANS (IDP)

- **All postdocs are required to complete an Individual Development Plan (IDP)**
 - **Requires a meeting with their appointing Faculty Sponsor**
 - **Must occur within first 90 days after appointment starts**
 - Research mentors are not eligible to conduct IDP meetings
- After the meeting, the Postdoc reports the meeting date in the IDP system
- The Faculty Sponsor receives an email to confirm the meeting in the IDP system
- Postdoc Admin can view and download IDP meeting reports for department or individual PIs

NEW APPOINTMENT

Postdoc Admin: Cal-Train Go Pass, Reimbursements



POLICY: CALTRAIN GO PASS/CLIPPER CARD

- The Go Pass program is offered to postdoctoral scholars residing off Stanford property and within typical daily commuting distances
- For more information about postdoc eligibility, refer to the [pilot program eligibility](#) page on the Parking & Transportation Services web site
- Passes cannot be obtained unless the Postdoc has an eligible residential address in AXESS identified as “Stanford (local) address” or “SEVIS (US)”

POLICY: EXPENSE REIMBURSEMENT

- There is no postdoc policy on departmental reimbursement of postdoc expenses; University policy applies
- Relocation expenses for postdocs can be paid one of two ways, either of which can be selected by the department or postdoc:
 - Direct reimbursement of expenses: this is processed through Oracle > Expense Requests and receipts are required. Specific instructions can be found here: https://web.stanford.edu/group/fms/fingate/finsystem/expreq/howto/create_relocation.html. The total amount reimbursed is provided directly to the postdoc—this may or may not be considered taxable income paid this way. The postdoc should check with a tax specialist.
 - Any amount can be entered in GFS: this is processed under the Other Payments tab. Receipts are not required and any amount of funding may be provided. This is considered a stipend and taxable income (and taxes are likely taken out on the payment automatically).

CHANGE WEB FORM

Postdoc Admin: Process Overview, Processing Guidelines, Appointment Extensions, Faculty Sponsor Changes, Funding Updates, Start Date Changes, Correction of Previous Research Experience



CHANGE WEB FORM: PROCESS OVERVIEW

- Change Form Process Overview
 - Postdoc Admin (Role #1) monitors appointment terms and submits Change Web Forms when changes occur
 - OPA reviews and approves Change Forms
 - No Role #3 approval for changes
- When appointment terms change, the Change Request Web Form is used to update the Postdoc record
- Changes reported via Change Form:
 - Extend the appointment end date
 - Change the appointment start date
 - Change Faculty Sponsor
 - Change or add Research Mentor
 - Correct previous research experience or PGY years

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/extend-postdoctoral-appointments>

PROCESS: CHANGE FORM PROCESSING GUIDELINES

- **Appointment extensions** – Admin submits at least **3 months** prior to appointment end date
 - Extension should be discussed by Faculty Sponsor and Postdoc early to allow for 3 month lead time
- **Extensions with a 6th training year request** – Admin submit **4-5 months** prior to appointment end date
- **Extensions that include a visa extension** – Admin submits to accommodate visa processing timeline
- **Extensions for outside-funded Postdocs** – Admin must upload to Nolij an updated funding letter
- **Appointment start date changes, Faculty changes, and previous research experience corrections** – Admin submits when informed of change

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/extend-postdoctoral-appointments>

PROCESS:

J-1 / DS-2019 VISA EXTENSION PROCESSING GUIDELINES

- **OPA CANNOT approve visa extensions without an accompanying Change Form**
- **Appointment extension end date and visa extension end date MUST match**
- Upload any required supporting documents to Noli to avoid processing delay (outside funding letters; externally sponsored DS-2019 documents, etc.)
- **J-1 Scholars:** Submit Change Form and DS-2019 extension web form
 - DS-2019 funding total must match annual funding reported to OPA, except when:
 - When appointment/DS-2019 extension does not equal one year
 - Report to OPA: Annual funding amount
 - Report to Bechtel: Funding amount for extension period
 - When external funding includes allowances beyond the annual funding amount
 - Report to OPA: Annual funding amount (do not include allowances)
 - Report to Bechtel: Funding amount for extension period including allowances

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/extend-postdoctoral-appointments>

PROCESS: F1 OPT / H-1B VISA EXTENSION PROCESSING GUIDELINES

- **OPA CANNOT** approve visa extensions without an accompanying Change Form
- **Appointment extension end date and visa extension end date MUST match**
- **F1 OPT:**
 - Submit Change Form (new end date should match STEM / EAD card end date)
 - Upload to Noli a PDF of STEM extension EAD card
 - (or submit documents/web forms for transition to J-1 or H-1B)
- **H-1B Visa:**
 - Submit Change Form and H-1B visa web form
 - Upload to Noli a PDF of H-1B/E-3 Visa Request Form and required supporting documents

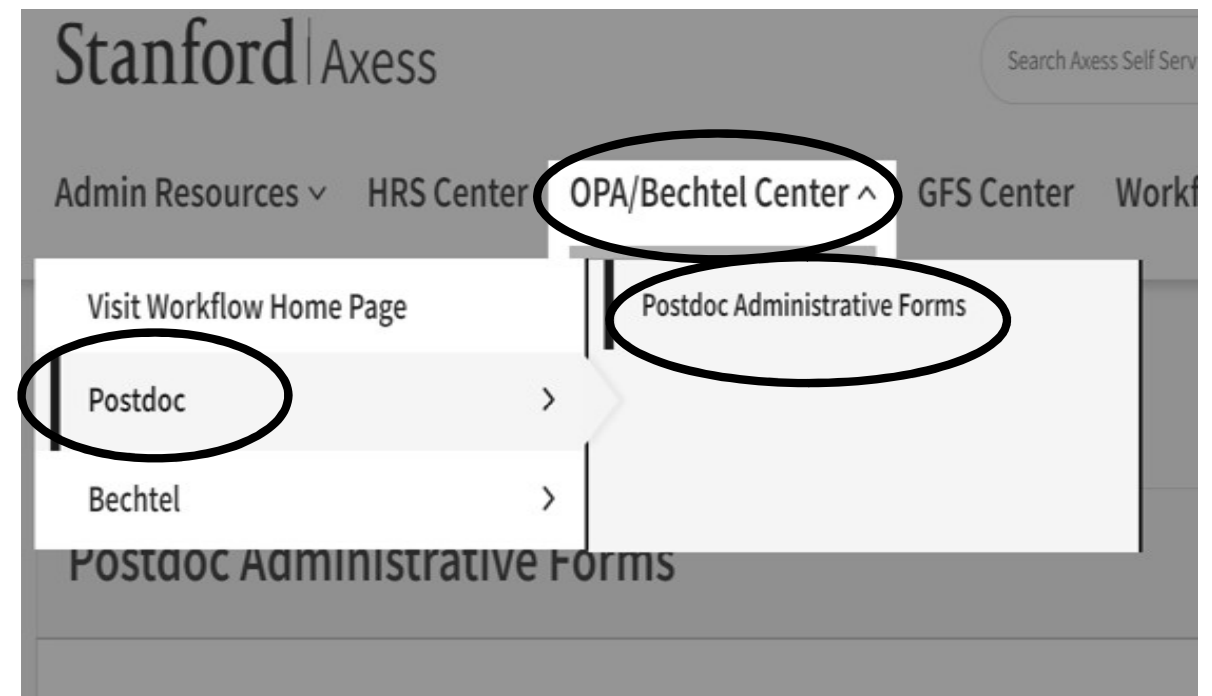
<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/extend-postdoctoral-appointments>

POLICY: EXTENSION WITH 6TH TRAINING YEAR

- **Policy Exception for a Sixth Year of Postdoctoral Training**
 - Appointment extensions that exceed the 60 month term limit may be permitted if approved by the Faculty Subcommittee
 - The maximum term limit is 72 months
 - Requires additional supporting information
 - Submit a Sixth Training Year Policy Exception smart sheet request

CLICK STEPS: CREATE A CHANGE REQUEST WEB FORM

- In AXESS:
 - Click the OPA / Bechtel Center tab
 - Click Postdoc
 - Click Postdoc Administrative Forms



<https://axess.sahr.stanford.edu/>

CLICK STEPS: ADD A CHANGE REQUEST WEB FORM

- Click the Change Transactions radio button
- The screen populates with Search boxes
 - **Ignore** the search boxes and the Search button
 - These are used to find EXISTING web forms
- Click on the ADD button to create a new Change Form

The screenshot shows a web form titled "Postdoctoral Forms". At the top, under the heading "Request Type", there are four radio buttons: "Recommendation Form", "Termination Form", "Change Transactions", and "LOA Form". The "Change Transactions" radio button is selected and circled in black. Below this, there are several input fields: "Empl ID", "First Name", "Last Name", "Academic Program", "Academic Plan", "Academic Sub-Plan", and "Transaction Status" (a dropdown menu). A large circle with a diagonal slash is drawn over the search fields, indicating they should be ignored. At the bottom of the form, there are three buttons: "Search", "Add", and "Clear All". The "Search" button is circled with a diagonal slash, and the "Add" button is circled in black, indicating it should be clicked.

CLICK STEPS: CHANGE REQUEST TYPES

- **Check the Request Type(s) for the Change(s) you are making**
- More than one Request Type can be submitted on the same change form
- The specific boxes populate after the Request Types are selected
 - Appointment date change button
 - Extend appointment end date
 - Revise appointment start date
 - Faculty change button
 - Change Faculty Sponsor
 - Add/change research mentor
 - Funding change button – NOT IN USE
 - Research Experience/PGY change button
 - Correct the number of months of previous research experience or PGY years

Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

☐ Appointment dates change ☐ Faculty change ☐ Funding change ☐ Research Experience / PGY change

Post Demo

*Student ID:

DeptID:

Academic Program:

Academic Plan:

Academic Sub-Plan:

Appointment Type:

Faculty Sponsor:

Research Mentor:

Salary: \$0.00

Post Graduate Year (PGY):

Appointment Start Date:

Appointment End Date:

Months Research Prior to Appt: 0

Months of Current Appointment: 0

US Citizenship Status:

Visa/Permit Type:

Visa End Date:

Recommendation Form ID:

Additional Information regarding terms:

Comments:

Save Submit Back Print

APPLY YOUR KNOWLEDGE: UPDATE APPOINTMENT TERMS

- ***Training Scenario Details:***

- Robin's appointment is going well as the end of his first year approaches
- Prof Lobell will extend Robin's appointment for an additional two years, to meet the maximum term limit of 60 months of research experience
- Prof Lobell will be on sabbatical for the last 12 months of Robin's appointment; the Faculty Sponsor will change to Prof Eric Lambin at that time
- The annual minimum funding increase on 09/01/23 will increase Robin's salary – the new amount must be entered in GFS
- Robin took a 90 day unpaid leave of absence (LOA) for professional development
 - His research experience can be discounted by 3 months for the unpaid leave time
 - His appointment can be extended by 3 months to make up for the unpaid leave

- **Create and submit Robin's Change form**

- REAL WORLD NOTE: change forms are submitted over time as changes occur, rather than all at once as in this training example

CLICK STEPS: ENTER THE STUDENT ID NUMBER

Enter Robin's Student ID# or click the magnifying glass to Look Up

Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type
☐ Appointment dates change ☐ Faculty change ☐ Funding change ☐ Research Experience / PGY change

Bio Demo

*Student ID:

DeptID: Appointment Start Date:

Academic Program:

Academic Plan:

Academic Sub-Plan:

Appointment Type:

Faculty Sponsor:

Research Mentor:

Salary: \$

Post Graduate Year (PGY):

Additional Information regarding this request

Comments:

Look Up *Student ID

Empl ID: begins with

Last Name: begins with hood

First Name: begins with robin

Academic Program: begins with

Academic Plan: begins with

Academic Sub-Plan: begins with

Search Results

View 100

Empl ID	Last Name	First Name	Academic Career	Student Career Nbr	Academic Program	Academic Program	Academic Program Status	Academic Plan	Academic Plan
06340421	Hood	Robin	Graduate	0	ESS	Earth System Science	Active	ESS-PD	Earth System Science

Bio/Demo box populates with Robin's current appointment data

Click all applicable change type buttons

Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type
☒ Appointment dates change ☒ Faculty change ☐ Funding change ☒ Research Experience / PGY change

Bio Demo

*Student ID: Robin Hood

DeptID: INSTINTLST Institute for Intl Studies Appointment Start Date: 09/01/2022

Academic Program: ESS Earth System Science Appointment End Date: 08/31/2023

Academic Plan: ESS-PD Earth System Science (PD) Prior Months Research: 24

Academic Sub-Plan: Months of Current Appointment: 12

Appointment Type: Research Scholar PD US Citizenship Status:

Faculty Sponsor: David Lobell Visa/Permit Type: UN

Research Mentor: Visa End Date:

Salary: \$68,238 Recommendation Form ID: 01714485

CLICK STEPS: APPOINTMENT DATE CHANGE BOX

- **“New Appointment Start Date” field**
 - DO NOT change the auto-populated start date for appointment extensions
 - The auto-populated start date changes ONLY when a new appointment is starting earlier or later than the date shown on the form
- The form confirms the start date change is correct to avoid errors
- **Training Scenario Details:**
 - Leave Robin’s start date as auto-populated

Appointment Date Change

Appointment Start Date Changes
Update the below date only when you need to change the official start of the postdoctoral appointment. Otherwise, leave the default date start date unchanged if this is an appointment extension request – make the change only to the Appointment End Date. Note that you must notify Bechtel and Postdoc Benefits of any changes to start dates.

New Appointment Start Date: 09/01/2022

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

New Appointment End Date (Extensions):

Post Graduate Year (PGY):

Appointment Date Change

Appointment Start Date Changes
Update the below date only when you need to change the the default date start date unchanged if this is an appoint Appointment End Date. Note that you must notify Bechtel

New Appointment Start Date: 09/01/2022

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

New Appointment End Date (Extensions):

Message
You have changed the appointment start date of this postdoc. Continue? (25400,133)
OK

CLICK STEPS: APPOINTMENT DATE CHANGE BOX

- **“New Appointment End Date” field**
 - Enter new end date to extend appointment
 - Tab out of end date field to recalculate “Total Research Experience...”
 - International Postdocs: visa status must be extended to same new end date
 - Submit DS-2019 extension web form
 - Submit H-1B visa extension web form
 - Upload PDF of extended EAD or PR card
- **Training Scenario Details:**
 - Enter Robin’s new end date: 11/30/25
 - 2 year extension (08/31/25) plus 3 months to recover 90 day unpaid LOA

Appointment Date Change

Appointment Start Date Changes

Update the below date only when you need to change the official start of the postdoctoral appointment. Otherwise, leave the default date start date unchanged if this is an appointment extension request -- make the change only to the Appointment End Date. Note that you must notify Bechtel and Postdoc Benefits of any changes to start dates.

New Appointment Start Date: 09/01/2022

Extensions of Appointments

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

New Appointment End Date (Extensions): 11/30/2025

Total Experience with Reappointment Term Included: 60 Months

CLICK STEPS: APPOINTMENT DATE CHANGE BOX

- **“Total Research Experience with Reappointment Term included:” field**
 - If this number is 61 or more
 - Shorten the end date until number is 60 or less, OR,
 - Submit a 6th Year policy exception request
- ***Training Scenario Details:***
 - Robin’s research experience of 60 months does not require a policy exception request

Appointment Date Change

Appointment Start Date Changes

Update the below date only when you need to change the official start of the postdoctoral appointment. Otherwise, leave the default date start date unchanged if this is an appointment extension request -- make the change only to the Appointment End Date. Note that you must notify Bechtel and Postdoc Benefits of any changes to start dates.

New Appointment Start Date: 09/01/2022

Extensions of Appointments

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

New Appointment End Date (Extensions): 11/30/2025

Total Experience with Reappointment Term Included: 60 Months

CLICK STEPS:


NEW FACULTY SPONSOR INFORMATION BOX


- **“Faculty Sponsor” field**
 - Enter new Faculty Sponsor ID number or click magnifying glass to Look Up
- **“Faculty Research Mentor” field**
 - Enter new Research Mentor ID number or click magnifying glass to Look Up, if applicable
- **Comments field**
 - Add comment to explain change in Faculty Sponsor or Research Mentor
- **Training Scenario Details:**
 - Enter Robin’s new Faculty Sponsor and explanation for the change


Faculty Sponsor:	David Lobell	Visa/Permit Type:	<input type="text"/>
Research Mentor:		Visa End Date:	
Salary:	<input type="text"/>	Recommendation Form ID:	<input type="text"/>

▼ New Faculty Sponsor Information

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

*Faculty Sponsor:  Eric Lambin

Faculty Research Mentor 

Comments: 

CLICK STEPS: RESEARCH EXPERIENCE/PGY CHANGE BOX

- **Research Experience should be revised when:**
 - Error is found in original calculation
 - Postdoc took unpaid leave of absence
- Research experience calculator is required to support revision
- **“Correction to Prior Months...” field**
 - Enter the revised number of months as noted on the research calculator
- **“Additional months leave” field**
 - Enter number of months of leave
- **“Notes” field**
 - Enter note to explain revision(s)
- **Training Scenario Details:**
 - In the Additional months leave field enter 3 for Robin’s 90 day unpaid leave
 - Add a note of explanation

Post Doctoral Scholars Appointment Dates, Funding and Faculty Changes

Request Type

☐ Appointment dates change ☐ Faculty change ☐ Funding change ☒ Research Experience / PGY change

← Bio Demo

*Student ID:	06340421	Robin Hood	Appointment Start Date:	09/01/2022
DeptID:	INSTINTLST	Institute for Intl Studies	Appointment End Date:	08/31/2020
Academic Program:	ESS	Earth System Science	Prior Months Research:	24
Academic Plan:	ESS-PD	Earth System Science (PD)	Months of Current Appointment:	12
Academic Sub-Plan:			US Citizenship Status:	
Appointment Type:	Research Scholar PD		Visa/Permit type:	UN
Faculty Sponsor:	David Lobell		Visa End Date:	
Research Mentor:			Recommendation Form ID:	01714485
Salary:	\$60000.00			

Research Experience / PGY change

Correction to Prior Month Research:

Currently listed as: 24

Prior months research at start of appointment should be: 24

New research experience as of start date 09/01/2022 is 24

Research months deduction for leaves:

Total months of leave to date: 3

Enter additional months leave: 3

New research experience as of appointment end date: 08/31/2020 is 57

Notes: Robin took a 90 day unpaid leave of absence for professional development.

CLICK STEPS: TEXT FIELDS AND ACTION BUTTONS

- **“Additional Information regarding terms” field**
 - Enter additional information to explain any non-self-explanatory changes
- **“Comments” field**
 - Enter any comments to OPA approver
- **Action Buttons**
 - Save – saves data entered in form
 - Submit – submits to workflow
 - Back – returns to previous screen
 - Print – prints a copy for paper files



A screenshot of a web form interface. It features two large text input fields. The first field is labeled "Additional Information regarding terms:" and the second is labeled "Comments:". Both fields have a small icon in the top right corner. Below the fields are four buttons: "Save", "Submit", "Back", and "Print".

Additional Information regarding terms:

Comments:

Save Submit Back Print

CLICK STEPS: CHANGE FORM POSTDOC ADMIN NOTICES

Admin Web Form Submission Notice

of changes in Start Dates.

08/15/2011

Extension end date for this postdoc here. If the New End Date is earlier of the APPOINTMENT End Date, complete a Termination Form instead. If the appointment is ending at an end date and the action is initiated by the Faculty Sponsor/Mentor, complete an Early Termination Form at http://postdocs.stanford.edu/admin/how-to/early_term.html in addition to submitting this form.

Extensions): 08/31/2012

Appointment Term Included:

Effective To-Date:

Information

If a research mentor was identified, enter the research mentor's information below. If you are updating this field blank when updating the sponsor information will retain the research mentor information. If you are changing to the research mentor, enter the new mentor's information below. If you are adding a new research mentor, enter the new mentor's information below. If you are and no other mentor is identified, you must now enter the faculty sponsor's name in the field below as the sponsor in order to update the information in PeopleSoft.

00020644 Rodney Beard

ding terms:

Message

PostDoc Change Request has been submitted successfully (25400,90)

OK Cancel

Admin Email Approval Notice after OPA Approval

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

Approved By: Shannon Monahan

00791329 has been approved by Shannon Monahan
 LAST NAME: Hood
 FIRST NAME: Robin
 TRANSACTION ID: 01714489

First name: Annie
 Transaction Id: 00791329
 Comments:

PROCESS:

CHANGE FORM EMAIL NOTICES TO POSTDOC

Submission Notice

From: <Robinhood7490@gmail.com>
 Date: March 11, 2019 at 7:17:21 PM PDT
 To: <wjzheng@stanford.edu>, <woodyp@stanford.edu>
 Subject: Postdoc Change Request for **Robin Hood** Transaction ID: 01736062 has been submitted.

This is a system-generated email to notify you that a request to change the postdoctoral appointment for **Robin Hood** has been made by departmental administrator **Tammy Wilson**.

The requested changes are as follows:

Change of appointment start date: **09/01/2022**

Change of appointment end date: **11/30/2025**

The request for these changes will be sent to the Office of Postdoctoral Affairs in accordance with University policy.

Approval Notice

From: workflow@psprcprd01.stanford.edu <workflow@psprcprd01.stanford.edu>
 Sent: Tuesday, September 17, 2019 11:19 AM
 To: Robinhood7490@gmail.com tjwilson@stanford.edu
 Subject: Postdoc Change Request **Robin Hood** Transaction ID: 01794380 has been approved.

Dear **Robin Hood**,

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

Change of appointment start date: **09/01/2022**

Change of appointment end date: **11/30/2025**

Please contact your Department Administrator **Tammy Wilson** with any questions about this notification.

Best Regards,
 Office of Postdoctoral Affairs

TERMINATION WEB FORM

Postdoc Admin: Process Overview, Processing Guidelines, End of Term, Early Terminations, Department Transfers, and More!



TERMINATION WEB FORM: PROCESS OVERVIEW

- Postdoc Admin (Role #1) submits Termination Web Form when appointment ends
 - Department Manager/DFA (Role #3) approves Termination Form
 - OPA reviews and approves the Termination Form

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/end-postdoctoral-appointments>

PROCESS: TERMINATION FORM PROCESSING GUIDELINES

- The Termination Form should be submitted **10 days** prior to termination date
- **The New End Date noted on the Termination Form MUST match the end date of all active pay lines in GFS**
- Termination Form is required to end tuition fees and insurance benefits
- Termination Form DOES NOT end pay lines in GFS
- Termination Form DOES NOT notify Bechtel to end the visa program for international postdocs
- Termination Form DOES NOT notify GME for School of Medicine postdocs
- **Any insurance charges incurred for a late submitted termination web form are the responsibility of the department in which the Postdoc is terminating**

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/end-postdoctoral-appointments>

POLICY: MOST COMMON REASONS APPOINTMENTS END

- Postdoc completes the appointment term at Stanford
- Postdoc takes a position outside of Stanford
- Postdoc takes a Faculty or Academic Staff position at Stanford
- Postdoc transfers to another Stanford department as a *Postdoc*
- PI/Faculty Sponsor ends appointment early for specified reason
 - *Requires Early Termination procedures*

POLICY:

EARLY TERMINATION BY FACULTY SPONSOR

- “Early Termination” process applies ONLY when **initiated by the Faculty Sponsor to end the appointment before the current end date**
- The Faculty Sponsor should contact the Associate Dean of Postdoctoral Affairs when there is potential of an early termination action
- Permitted reasons for early termination noted in the postdoc offer letter:
 - Loss of funding
 - Change in programmatic need
 - Documented unsatisfactory postdoc performance
- Written notice of early termination must be given to Postdoc 30-60 days prior to the early end date
 - 90 days in cases of loss of funding
- If the Postdoc has a visa, Postdoc Admin must notify Bechtel I-Center

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/early-termination-appointing-department>

POLICY:

EARLY TERMINATION DUE TO UNSATISFACTORY PERFORMANCE

- Must follow a process by which:
 - Progress discussions and written evaluation by the Faculty Sponsor are made
 - Clear articulation (preferably written) of the specific steps to remedy deficiencies, including the possibility of early termination if deficiencies remain by a specific date
 - Process occurs over weeks or months, in advance of the early termination action
- The Early Termination Notice to Postdoc must follow the standard template on the OPA web site:
 - <https://postdocs.stanford.edu/sites/default/files/samplenoticeearlytermination.docx>

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/early-termination-appointing-department>

POLICY: EARLY APPOINTMENT END FOR INTERNATIONAL SCHOLARS

- Bechtel International Center is under regulatory requirement to provide notice to the State Department when a postdoctoral appointment ends 30 days or more before the DS-2019 expiration date
- **Postdoc Admin must notify Bechtel International Center when:**
 - J-1 Scholar appointment ends 30 days or more before the DS-2019 expires
 - Admin must submit a Shorten J-1 Program Request web form to Bechtel I-Center
 - H-1B appointment ends 30 days or more before the visa expires
 - Admins must follow the specific requirements for H1B holders

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/early-termination-appointing-department>

PROCESS:

POSTDOC TRANSFER OR FACULTY/STAFF HIRE AT STANFORD

- **Department Transfer of Postdoc Appointment** to another Stanford department
 - Terminating and Appointing departments must work together to ensure Termination is submitted and approved in advance of the New Appointment Recommendation Form to avoid misrouted web forms
- **Postdoc Transition to Faculty Appointment**
 - Work with your department's Faculty Affairs Office
- **Postdoc Transition to Academic Staff – Researcher**
 - Work with your department's Human Resources Office

APPLY YOUR KNOWLEDGE: TERMINATE APPOINTMENT

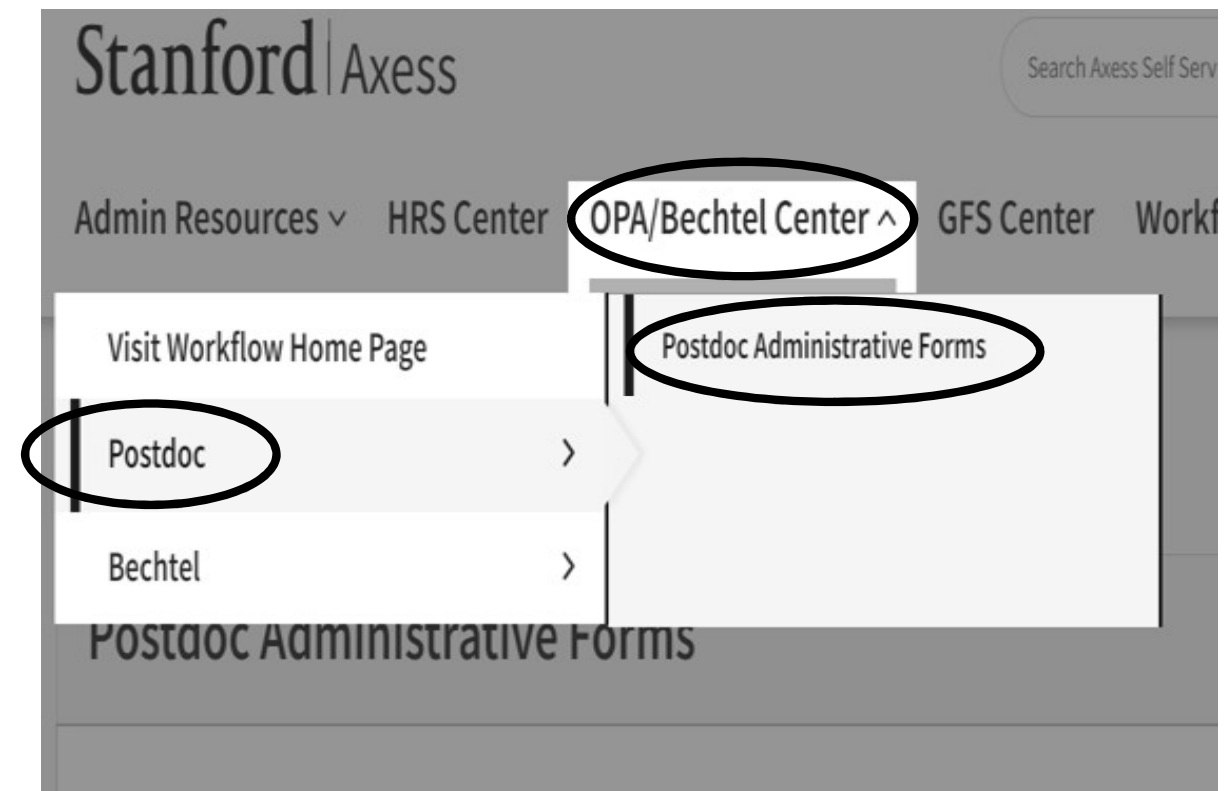
- ***Training Scenario Details:***

- Robin completed his appointment term as of 11/30/2025
- The Action Reason is PEND – end of appointment term
- His forwarding address is 4321 Walnut Street, West Lafayette, IN 42424, as of 12/01/2025
- Robin provided a new non-Stanford email address:
robinhpurdue@gmail.com
- He was offered an Assistant Professorship at Purdue University
- Create and submit Robin's Termination form

CLICK STEPS: CREATE A TERMINATION FORM

- In AXESS
 - Click the OPA/Bechtel Center tab
 - Click Postdoc
 - Click Postdoc Administrative Forms

<https://axess.sahr.stanford.edu/>



CLICK STEPS: ADD A TERMINATION FORM

- Click the Termination Form button
- The screen populates with search boxes
 - **Ignore** the search boxes and the Search button
 - These are used to find EXISTING web forms
- Click the ADD button to create a Termination form

Postdoctoral Forms

Request Type

☐ Recommendation Form ☒ Termination Form ☐ Change Transactions ☐ LOA Form

Empl ID

First Name

Last Name

Academic Program

Academic Plan

Academic Sub-Plan

Transaction Status

CLICK STEPS: ENTER THE STUDENT ID NUMBER

Enter Robin's Student ID number or click the magnifying glass to Look Up

Bio Demo box populates with Robin's current appointment data

POSTDOCTORAL SCHOLAR TERMINATION FORM

* Required field + Must match passport

Bio Demo

*Student ID:

*Acad Org:

Student Email:

Acad Program:

Acad Sub-Plan:

Fellowship / Program:

Dates of Appointment

Start Date:

*New End Date:

*Action Reason:

Forwarding Information for Official Stanford

*Address Line 1:

*City:

State:

*Mailing Address Valid As Of:

*Non-Stanford

Look Up *Student ID

Empl ID:

Last Name:

First Name:

Academic Program:

Academic Plan:

Academic Sub-Plan:

begins with

begins with

begins with

begins with

begins with

begins with

hood

robin

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100

Empl ID	Last Name	First Name	Academic Career	Student Career Nbr	Academic Program	Academic Program	Academic Program Status	Academic Plan	A
06340421	Hood	Robin	Graduate	0	ESS	Earth System Science	Active	ESS-PD	E

POSTDOCTORAL SCHOLAR TERMINATION FORM

* Required field + Must match passport

Bio Demo

*Student ID:

06340421

Robin Hood

*Acad Org:

INSTINTLST

Institute for Intl Studies

Student Email:

Acad Program:

Acad Sub-Plan:

Fellowship / Program:

Robinhoo90@gmail.com

ESS

Phone:

Academic Plan:

Recommendation ID:

01714485

Earth System Science (PD)

Dates of Appointment

Start Date:

*New End Date:

*Action Reason:

09/01/2022

End Date:

11/30/2025

CLICK STEPS: DATES OF APPOINTMENT BOX

- **Review the End Date field**
 - Ensure the End Date is **ON OR AFTER** the **date you enter** in the New End Date field
 - If the End Date is prior to the New End Date, STOP!
 - You must first submit a Change form to extend the appointment to the New End Date
- **Enter the end date in the New End Date field**
- **Enter the applicable Action Reason**
 - Click the magnifying glass to Look Up
- **Training Scenario Details:**
 - Enter Robin's end date: 11/30/23
 - Enter Robin's Action Reason: PEND

POSTDOCTORAL SCHOLAR TERMINATION FORM

* Required field + Must match passport

▼ Bio Demo

*Student ID:	06340421	Robin Hood	*Acad Org:	INSTINTLST	Institute for Intl Studies
Student Email:	robinhood7490@outlook.com			Phone:	
Acad Program:	ESS	Earth System Science	Academic Plan:	ESS-PD	Earth System Science (PD)
Acad Sub-Plan:				Recommendation ID:	01714485
Fellowship / Program:					

▼ Dates of Appointment

Start Date:	09/01/2022	End Date:	11/30/2025
*New End Date:	11/30/2025		
*Action Reason:	PEND	End of Appointment Term	

CLICK STEPS: CHOOSING THE CORRECT ACTION REASON

- **PACC - Accepted another position**
 - Postdoc ends appointment early to take another position
- **PDEP - Department transfer (see next slide)**
 - Postdoc transfer to a new postdoc position in another Stanford department
- **PEAR - Early termination**
 - Use ONLY when Faculty Sponsor ends appointment early due to specified reasons
 - Must follow early termination process noted on Slide 205-6
- **PEND - End of appointment term**
 - Postdoc has *substantially completed* the appointment term
- **PPER - Personal/family reasons**
 - Postdoc ends appointment early for personal reasons
- **PQWN - Quit without notice**
 - Postdoc ends appointment early without notice
- **PRES – Resignation**
 - Postdoc resigns appointment early
- **RRTN - Failure to return from LOA**
 - Postdoc fails to return from an approved leave of absence

The screenshot shows a web application interface for a student record. A 'Look Up *Action Reason' dialog box is open, displaying the following fields:

- Program Action:** Discontinuation
- Action Reason:** begins with
- Description:** begins with

Below the fields are buttons for 'Look Up', 'Clear', 'Cancel', and a 'Basic Lookup' link.

The 'Search Results' table is displayed below the dialog box:

Action Reason	Description
PACC	Accepted another position
PDEC	Deceased
PDEP	Department Transfer
PEAR	Early Termination
PEND	End of Appointment Term
PPER	Personal/Family Reasons
PQWN	Quit without Notice
PRES	Resignation
RRTN	Failure to Return from LOA

POLICY: DEPARTMENT TRANSFER

- When a current Stanford Postdoc ends a postdoc appointment in one department and will be appointed as a POSTDOC in another Stanford department
- **IMPORTANT: Terminating and appointing departments must coordinate the transfer to ensure continuation of pay, benefits, ID Card privileges, and visa compliance (for international postdocs); i.e., no gap between termination and new appointment start date**
- **The current department submits a Termination Form**
 - Action Reason is “Departmental Transfer”
- **The new department submits a Postdoc Invite and Recommendation Form**
 - CANNOT use the email address used for previous postdoc appointment
 - Is this request for Department Transfer field is YES

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/transfer-another-stanford-department>

CLICK STEPS: FORWARDING INFORMATION FOR OFFICIAL STANFORD COMMUNICATIONS BOX

- Stanford may need to send official communications to former postdocs
- It is important to obtain a forwarding mail address and email address
- **Training Scenario Details:**
 - Enter Robin's forwarding address:
 - 4321 Walnut Street, West Lafayette, IN 44444, as of 12/01/2023
 - Enter Robin's non-Stanford email address: robinhpurdue@gmail.com

Forwarding Information for Official Stanford Communications

*Address Line 1:	4321 Walnut Street	Address Line 2:	
*City:	West Lafayette		
State:	IN	Postal Code:	44444
*Mailing Address Valid As Of:	12/01/2023 		
*Non-Stanford Email Address:	robinhpurdue@gmail.com	Phone:	

This must be a permanent, personal email address for the postdoc. It cannot be an @stanford.edu email address.

CLICK STEPS: PROFESSIONAL INFORMATION BOX

- OPA tracks postdoctoral outcome data
- It is important to get new position information
- Enter the Postdoc's New Position Title, Type of Position, and the Institution or Company

- ***Training Scenario Details:***

- Enter Robin's New Position Title: Assistant Professor
- Type of Position: click the magnifying glass to Look Up and select: 001 Academic Faculty Position
- Enter Robin's New Institution: Purdue University

Professional Information

*New Position Title: Assistant Professor

*Type of Position: 001 Academic-Faculty Position

*New Institution or Company: PURDUE UNIVERSITY

Look Up *Type of Position

STF PostDoc Position: begins with

Position Description: begins with

Long Description: begins with

Look Up Clear Cancel Basic Lookup

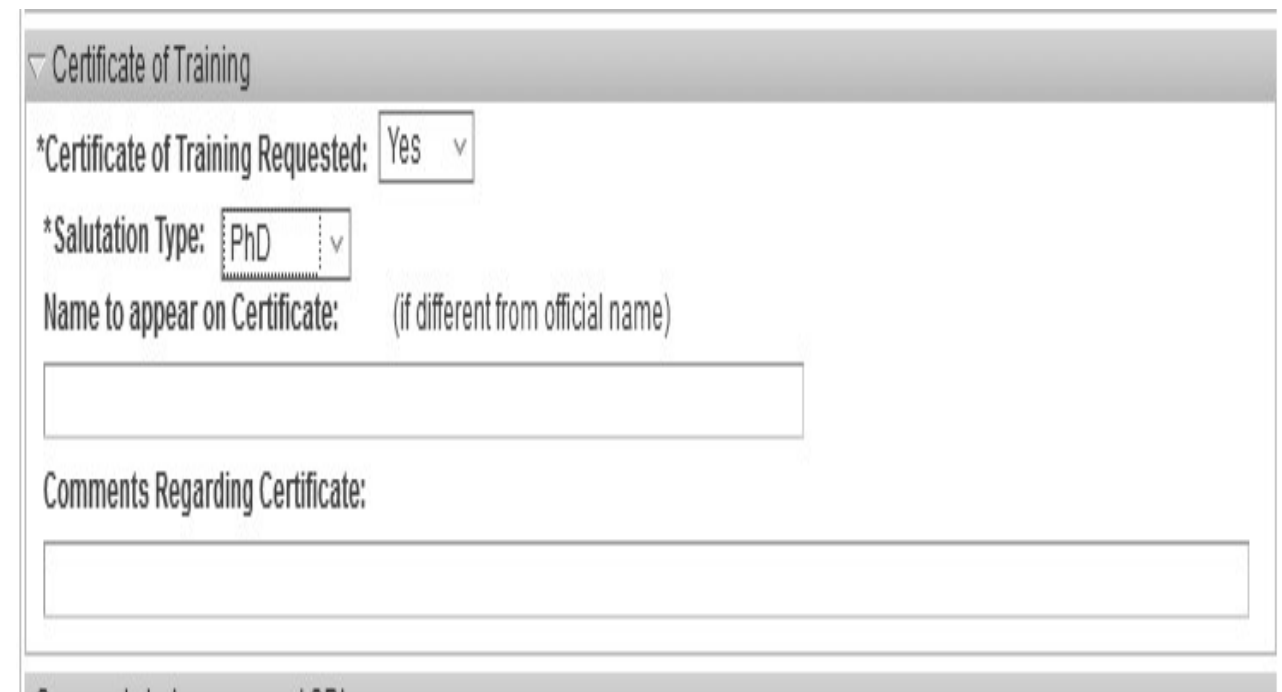
Search Results

View 100

STF PostDoc Position	Position Description	Long Description
001	Academic-Faculty Position	FULL-TIME FACULTY APPOINTMENTS, (ASSISTANT) PROFESSORSHIPS, RETURN TO PROFESSORSHIPS, INSTRUCTOR POSITIONS, CLINICAL INSTR
002	Academic-Non Faculty	INCLUDES ALL RESEARCH (NON-FACULTY, NON-INSTRUCTOR) STAFF POSITIONS IN A UNIVERSITY SETTING OR RESEARCH INSTITUTE
003	Industry-Research	INCLUDES ALL RESEARCH POSITIONS IN NON-ACADEMIC INSTITUTIONS
004	Industry-Non Research	INCLUDES POSITIONS IN INDUSTRY THAT ARE NOT RESEARCH-BASED, SUCH AS CONSULTING, MARKETING, WRITING, BUSINESS DEVELOPMENT
005	Government	INCLUDES THOSE WORKING IN GOVERNMENT AGENCIES SUCH AS THE FDA, NIH (INCL FELLOWS), VA & PAIR, NAVY FOREIGN GOVERNMENT
006	Medical Practice	INCLUDES ALL PHYSICIANS, ATTENDING, SPECIALISTS (I.E. ANESTHESIOLOGISTS, PSYCHIATRISTS), MEDICAL DIRECTORS, AND PRIVATE PRACT
007	Personal	INCLUDES TRAINING INTERRUPTIONS DUE TO FAMILY LEAVES, MATERNITY TIME-OFF
008	Another Postdoc or Residency	INCLUDES THOSE BEGINNING OR RETURNING TO RESIDENCIES OR PURSUING ANOTHER POSTDOC POSITION
009	School-Pursuing Another Degree	INCLUDES ALL THOSE RETURNING TO SCHOOL FOR ANOTHER DEGREE (I.E. MD, MPH, PHD)
010	Undecided	INCLUDES THOSE WHO ARE UNDECIDED ABOUT NEXT STEP
011	Did Not Respond	INCLUDES POSTDOCS WHO DID NOT RESPOND TO THE QUESTION OR PROVIDE INFORMATION

CLICK STEPS: CERTIFICATE OF TRAINING BOX

- Certificate of Training
 - **Certificates are no longer produced**
 - Please direct postdocs to the Verification Letter request web page



The screenshot shows a web form titled "Certificate of Training" with a dropdown arrow on the left. The form contains the following fields:

- *Certificate of Training Requested: A dropdown menu with "Yes" selected.
- *Salutation Type: A dropdown menu with "PhD" selected.
- Name to appear on Certificate: A text input field with the placeholder text "(if different from official name)".
- Comments Regarding Certificate: A large text area for additional comments.

CLICK STEPS: ADMIN INFORMATION BOX

- **Postdoc Admin must click the checkbox “I understand that”** to acknowledge completion of the additional steps required for appointment termination
- **Action Buttons**
 - Save – saves data entered in form
 - Submit – submits form to workflow
 - Back – returns to previous screen
 - Print – Prints hard copy for paper files

The screenshot shows a web form titled "Admin Information". It contains a table with the following data:

Admin:	05707079	Admin Name:	Tammy Wilson
Admin Email:	pacs-dev-emails@stanford.edu	Admin Phone:	650/380-1283

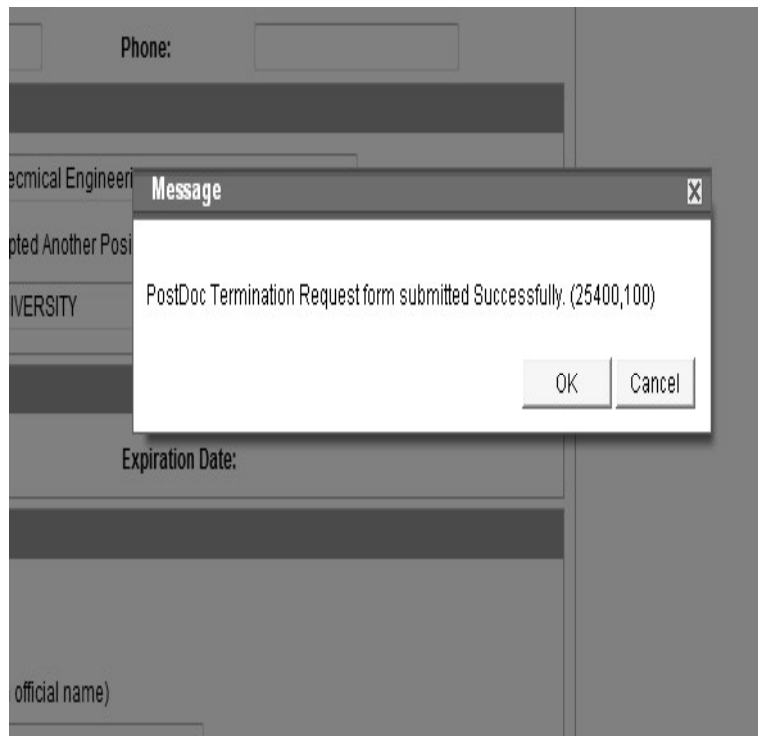
Below the table is a checkbox labeled "I understand that:" which is checked. Below the checkbox is a list of five numbered items:

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 appointment end date documented in this form.
3. This form will end tuition registration fees and insurance benefits.
4. If the postdoc is an International Scholar, you must follow Bechtel International Center's policies on terminating visas.
5. If this postdoc is a Clinical Fellow, GME will be notified via email upon approval of this form by OPA. Please notify GME if applicable.

At the bottom of the form are four buttons: "Save", "Submit", "Back", and "Print". The "Submit" button is circled.

PROCESS: TERMINATION FORM EMAIL NOTICES

Confirmation of Form Submission to Admin



Phone:

Technical Engineer

Accepted Another Position

UNIVERSITY

Expiration Date:

official name)

Message

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

OK Cancel

Approval Email Notice to Admin

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: Hood

FIRST NAME: Robin

TRANSACTION ID: 01714489

Comments:

Email Notice to Postdoc and Benefits

Test message: Termination Request

workflow@psprcuat20.stanford.edu

Sent: Wed 8/3/2011 4:30 PM

To: postdocaffairs@stanford.edu

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

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

Thank you.
Office of Postdoctoral Affairs

PROCESS: APPOINTMENT VERIFICATIONS

- Former postdocs and third party vendors may request verification of a postdoctoral appointment
- OPA can only verify postdoctoral appointment dates for postdoctoral scholars who were appointed through Stanford University
- Verification letters are requested on OPA's website

<https://postdocs.stanford.edu/about/verifications>

NAVIGATING POSTDOC WEB FORMS

Check Status of Pending Forms, Find Saved or Returned Web Forms



CLICK STEPS: REVIEW TRANSACTION STATUS

- When Searching for One Form, you can
 - Check Transaction Status for current status of form
 - Click the Transaction ID to open the web form to view approval routing
- **Helpful Hint:** Special characters (accent (é), umlaut (ä), tilde (ñ), etc.) can't be searched
 - Enter the name up to the letter before the special character

Postdoctoral Forms

Request Type

☒ Recommendation Form
 ☐ Termination Form
 ☐ Change Transactions
 ☐ LOA Form

Postdoctoral Request Type

First Name

Last Name

Academic Program

Academic Plan

Academic Sub-Plan

Transaction Status

Search

Add

Clear All

Search Results

Transaction ID	Postdoctoral Request Type	First Name	Last Name	Academic Program	Academic Plan	Academic Sub-Plan	Transaction Status
1 01714485	Research	Robin	Hood	ESS	ESS-PD		Approved

CLICK STEPS: CHECK APPROVAL ROUTING IN WORKFLOW

- In AXESS, click OPA/Bechtel Center tab
- In the Work Flow Transaction List, click My Pending Requests
- Find and click on the transaction
- Review the Approval Schedule to see where form is Pending

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

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

* Required field + Must match passport

Workflow Transaction Information			
WF Trans ID: 00791323	Status: PENDING	Status Date & Time: 08/02/11 4:57:52PM	
Originator: Ransome,Annelies Ashoff	Email: pscs-dev-emails@stanford.edu	Phone: 650/736-0129	

Approval Schedule						
Name	Approval Role	Approver Type	Approval Sequence	Transaction Action	Status Date & Time	Comments
1 Rania Sanford	PD-CHAIR-PROXY-DFA	Approver	10	APPROVED	08/02/2011 4:57:52PM	
2 Alistair Murray	PD-CHAIR-PROXY-DFA	Approver	10	Peer Acted	08/02/2011 4:57:52PM	
3 Annelies Ransome	PD-DEPT-ADMIN-VERIFY	Approver	20	PENDING	08/02/2011 4:57:52PM	
4 Shannon Mohanan	PD-CHAIR-ADMIN	Approver	20			

Approve	Return	Decline		Print	Back to Workflow Home
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Post Doc Transaction Details		
*Select PostDoc Information sheet:	00791322	
*Postdoctoral Request Type	PostDoc Research Scholars	
Is this request for Department Transfer:	No	
Comparative Display of Biographic Data	Offer Letter	Complete Information Sheet

CLICK STEPS: FIND A SAVED OR RETURNED WEB FORM

- In AXESS
 - Mouse over the OPA/Bechtel Center tab
 - Click on Postdoc Administrative Forms link
 - Click button to the left of the type of form to be searched
- Enter Postdoc name in search box to find one form
- Leave search boxes blank to search for all forms of the type checked
- Click Search
 - DO NOT click Add – creates a new form

Postdoctoral Forms

Request Type

☒ Recommendation Form ☐ Termination Form ☐ Change Transactions ☐ LOA Form

Postdoctoral Request Type:

First Name:

Last Name: ←

Academic Program: 🔍

Academic Plan: 🔍

Academic Sub-Plan: 🔍

Transaction Status:

Search for One Form

- Enter postdoc first, last names
- Click SEARCH

Postdoctoral Forms

Request Type

☒ Recommendation Form ☐ Termination Form ☐ Change Transactions ☐ LOA Form

Postdoctoral Request Type:

First Name:

Last Name:

Academic Program: 🔍

Academic Plan: 🔍

Academic Sub-Plan: 🔍

Transaction Status:

Search for ALL Forms

- Leave search fields blank
- Click SEARCH

UNPAID LEAVES OF ABSENCE

(LOA)



POLICY: UNPAID LEAVES OF ABSENCE (LOA) IN WORKFLOW

- **The Postdoc initiates the LOA form via AXESS**
- The LOA form routes to Postdoc Admin for approval and benefits PTA entry
 - For international scholars in J-1 or H-1B visa status, please note in comments that Bechtel is aware of the leave to ensure no regulatory violations
- Maximum 3 months unpaid leave with approval of PI and in accordance with Postdoc Benefits, visa policies
- Postdocs with outside funding must have approval of funding agency

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/leave-absence>

POLICY:

BENEFITS DURING UNPAID LEAVES OF ABSENCE

- Postdocs are required to maintain benefits while on an approved, unpaid LOA
- Although customary, Faculty Sponsors are not required to pay for the Stanford health insurance coverage for the Postdoc while on an approved unpaid LOA
 - In this instance, the Postdoc must pay the total benefit cost including the institutional and Postdoc portion
 - Postdoc must enter banking information in Benelogic so the total premium can be collected through a direct debit to their bank account
- If the Faculty Sponsor agrees to pay the full cost of the institutional portion of the postdoc's benefits, typically unrestricted funds are used
 - A PTA to which the premiums can be charged must be provided on the LOA web form
 - Faculty Sponsor may NOT pay for benefits if unpaid leave is the result of invalid work status for international scholar
- Faculty Sponsors are required to pay for life/accidental death and disability coverage for their postdocs while on an unpaid LOA

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/leave-absence>

POLICY:

J-1 VISA AND UNPAID LEAVES OF ABSENCE

- Unpaid LOA requests from International postdocs are reviewed in light of visa regulations and may be declined if the leave violates visa rules
 - International postdocs in J-1 visa status **MUST** leave the U.S. in order to qualify for an unpaid LOA
- International postdocs who request unpaid leave should do so **BEFORE** the leave start date, or as soon as possible after the leave begins
- The University (Bechtel International Center) is required to report infractions in the scholar's SEVIS record

<https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/leave-absence>

OBI FINANCIAL REPORTING



POLICY: OBI FINANCIAL REPORTING

- Reports for GFS can be found in BI (bi.stanford.edu)
 - [Folder: Graduate Financial Support > Postdocs]
- Getting access:
 - Access to reports is based on your PeopleSoft security access
 - If you have at least GFS Inquire role in PeopleSoft, you have access to associated GFS reports in BI
 - Submit a [Service Now Help Ticket](#) for Access to OBI Financial Reporting
- **Friday Open Lab**
 - Personalized help with OBI Financial Reporting with knowledgeable staff
 - Ensure you have access to OBI Financial Reporting before scheduling:

Day:	Every Friday
Time:	Requires advance scheduling; 9:00, 10:00 or 11:00 am PST
Where:	Remote via Zoom

Schedule a time by submitting a [Support Request](#) to Financial Training