

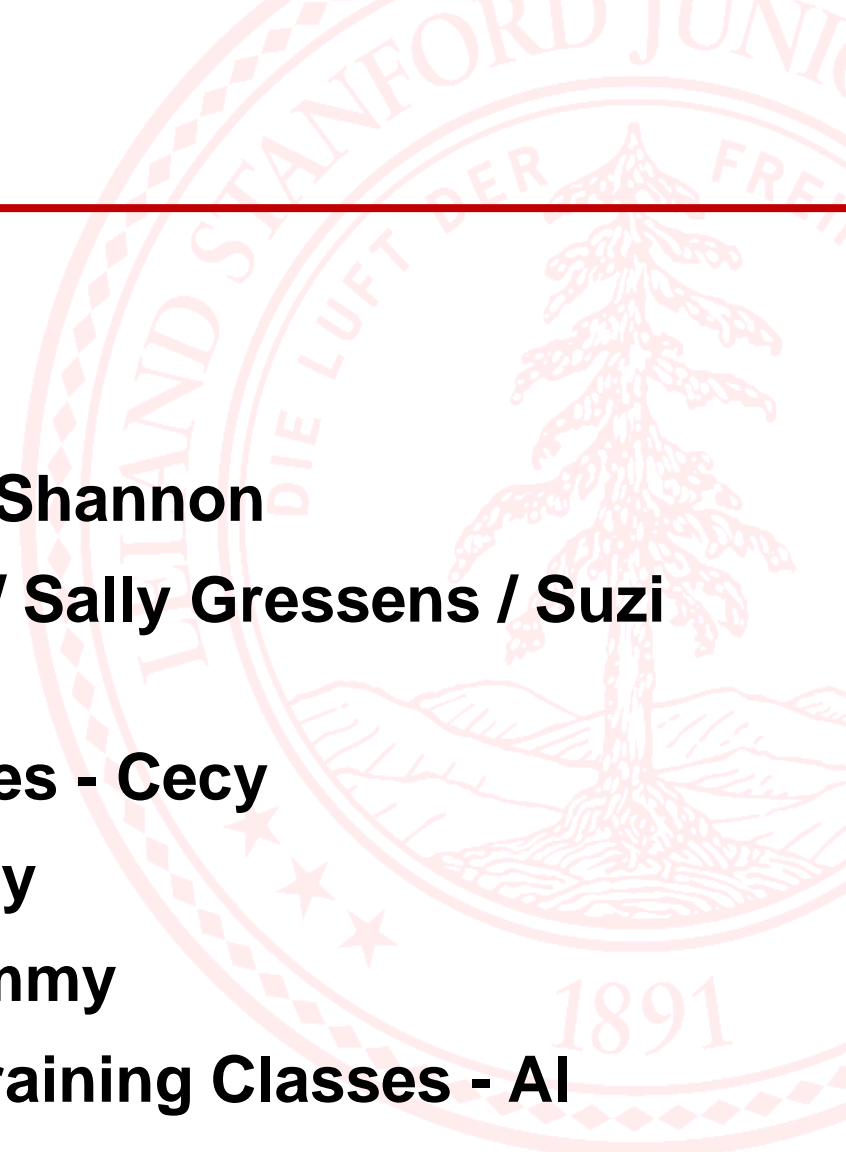
Postdoctoral Administrators Quarterly Meeting

July 13, 2017
10:00 a.m. – 11:30 a.m.
LKSC 130



Agenda

- ❖ **Welcome – Shannon**
- ❖ **Uniform Guidance Audit – Shannon**
- ❖ **GFS Redesign – Shannon / Sally Gressens / Suzi Weersing / Nancy Child**
- ❖ **Disability and Family Leaves - Cecy**
- ❖ **Travel Ban Update – Tammy**
- ❖ **New Website Preview - Tammy**
- ❖ **Open Lab and In-Person Training Classes - Al**



Welcome!

Shannon Monahan



Uniform Guidance Audit

Shannon Monahan



Uniform Guidance Audit

A large, faint watermark of the Stanford University seal is visible in the background. It features a redwood tree in the center, surrounded by the text 'Leland Stanford Junior University' and '1891'. The seal is circular with a diamond-patterned border.

(Formerly known as A-133 Audit)

Findings related to Postdoc GFS entry

- Missing days of postdoc pay
- Double-payment
 - End date of one pay line is the same as the start date of another pay line
- Missing documentation for pay from research grants

Uniform Guidance Audit



Acceptable Forms of documentation for postdocs

1. Offer Letter in the Postdoc Webforms system.

If the postdoc is paid at the minimum (as per the Minimum Required Postdoc Salary table), it is assumed that the amount will increase to the minimum (on October 1 each year).

This is acceptable only if a clear description was entered in the Funding Description fields (including the number of years experience as per the PostDoc Salary table).

Uniform Guidance Audit



Acceptable Forms of documentation for postdocs

2. Change Form confirmation email with new salary level and type of funding (approved by PI).

This is acceptable only if a clear description was entered in the Funding Description fields.

3. Email from the PI confirming account and salary level approved.

Feel free to have this uploaded to the Rec Form so that the email remains in a central location (and accessible to others in case the admin leaves the University).

Uniform Guidance Audit

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Acceptable Forms of documentation for postdocs

4. Other?

If there are other potential documents, please feel to email Shannon Monahan at smonahan@stanford.edu to review with Research & Compliance and add it to the list.

This is currently a work-in-progress.

GFS Redesign

**Shannon Monahan, Suzi Weersing, Sally
Gressens, Nancy Child, Karen Cooper**



GFS Redesign

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Why?

- GFS is a custom PeopleSoft module created in 2002 that manages the entry and approval of graduate student and postdoc financial support
- User interface and functionality have remained unchanged with only minimal policy and compliance updates
- Does not currently reflect changes in postdoc processing, which have entirely diverged from the processing of graduate support

GFS Redesign

Who's involved?

| Project Stakeholders | |
|----------------------|-------------------------------|
| Karen Cooper | Financial Aid Office |
| Kelly Wright | Financial Management Services |
| TJ Fletcher | Student Financial Services |

| Steering Committee | | | |
|--------------------|-------------------------------------|-------------------------|------------------------------|
| Canice Auyeung | Financial Aid Office | Shawna Powell-Blunt | Payroll |
| Nancy Child | Financial Aid Office | Corrie Potter | Institutional Research |
| Vrinda Gopal | Research & Compliance | Susan Jeanette Weersing | H&S Dean's Office |
| Sally Gressens | School of Engineering | Dave Bungler | UIT - Administrative Systems |
| Larry Ibarra | Student Financial Services | Leo Volkov | Administrative Systems (AS) |
| Rebecca Jantzen | Vice Provost for Graduate Education | Prashanth Nellore | Administrative Systems (AS) |
| Marianne Liang | H&S Dean's Office | Christina Reynolds | Administrative Systems (AS) |
| Shannon Monahan | Office of Postdoctoral Affairs | | |

GFS Redesign

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Project Objectives & Guiding Principles

- Separate grad students, postdocs, and non-matrices → apply unique business rules
 - ex. Remove quarters from postdoc section
- Modernize user interface and minimize data entry and clicks
- Alert users of potential issues with new warnings and alerts

GFS Redesign

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Project Objectives & Guiding Principles (con't)

- Make it easier to catch compliance issues
 - ex. Overlapping dates of postdoc pay
- Modularize and enhance training (based on user role assignments)
- Improve reporting based on current business processes

GFS Redesign

Phase 1 – to be completed during winter 2018

User Experience

- Modern & intuitive UX designed to minimize data entry & clicks
- Vertical design
- Uniform design across all entry functions
- Meaningful summary details
- Accurate and complete history of changes

Functionality

- Grad, postdoc & non-metrics will be managed separately
- Align business rules for each discrete student population
- Automate routine set-ups
- Create alerts
- Introduce student review & acknowledgment of awarded aid

User Roles Training

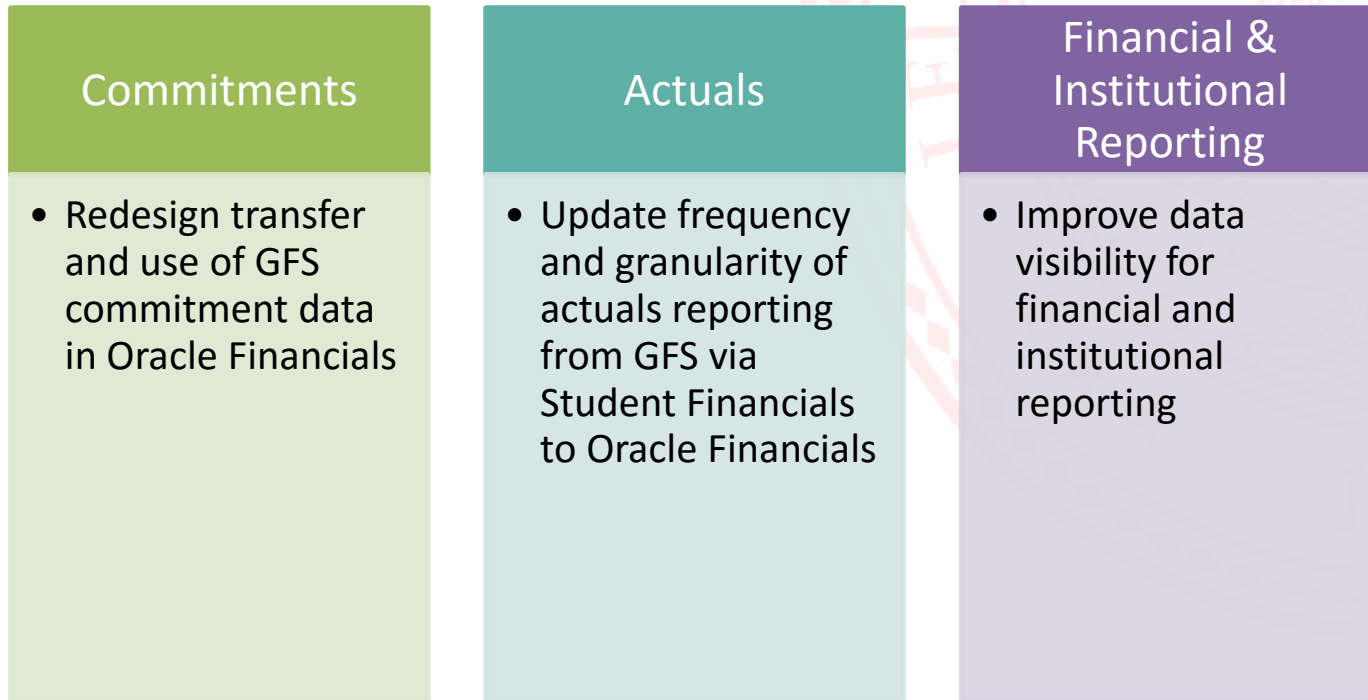
- Redesign GFS user roles
- Create user training aligned with user roles
- Resolve, as possible, and increase visibility to potential Segregation of Duties issues

Operational Reporting

- Introduce new data elements to facilitate reporting needs
- Migrate & redesign reports from GFS to BI
- Align user roles with training roles, possible reporting only role

GFS Redesign

Phase 2 – to start some time in 2018



GFS Redesign







The background of the slide features a large, faint watermark of the Stanford University seal. The seal is circular and contains the text "LELAND STANFORD JUNIOR" at the top and "DIE LUFT DER FREI" at the bottom. In the center of the seal is a redwood tree, and the year "1891" is visible at the bottom of the seal.

Changes for postdoc-specific entry and reporting:

- Removal of quarters
- Less data entry
- Updated terminology
- Automatic system calculation of base pay
- Separate section for Other Payments
- Reports like: *What were my postdocs making on date mm/dd/yyyy?*
- And more???

Aid Entry

POST DOC INFO

| | | | |
|----------------------------------|---|---|---|
| ID [REDACTED] | NAME [REDACTED] |     |  |
| APPOINTMENT START | ANTICIPATED END | HOME ORG PHYSICS | |
| US CITIZENSHIP STATUS CITIZEN | DIRECT DEPOSIT  | MAIL CODE 5678 | |

ALL AID SUMMARY

| STIPEND & SALARY SUPPORT | ANNUALIZED AMOUNT |
|--------------------------|-------------------|
| MONTHLY STIPEND | \$10,000 |
| ASSIST SALARY | \$56,667 |
| OUTSIDE FUNDING | \$30,000 |
| TOTAL | \$96,667 |
| OTHER SUPPORT | TOTAL AMT |
| OTHER PAYMENTS | \$4800 |

AWARD YEAR (OCT 1 - SEPT 30)

2017

Stipend Salary Outside Funding Other Payments



| <input type="checkbox"/> | AID SEQUENCE | IDENTIFIER | START DATE | END DATE | ANNUAL AMT | MONTHLY AMT | PAY ORG | LINE STATUS |
|--------------------------|--------------|------------|------------|----------|------------|-------------|---------|-------------|
|--------------------------|--------------|------------|------------|----------|------------|-------------|---------|-------------|

| | | | | | | | | |
|--------------------------|--------|-------------|------------|---|----------|----------|------|-----------|
| <input type="checkbox"/> | STP001 | Jones Smith | 01/05/2017 | - | \$10,000 | \$833.33 | PAAA | Completed |
|--------------------------|--------|-------------|------------|---|----------|----------|------|-----------|

DETAIL

| SEQ NO | AMOUNT | ITEM TYPE | PTA | EXPEND TYPE | TASK ORG | CHRG PRIORITY |
|--------------|-----------------|--------------|------------|-------------|----------|---------------|
| 1 | \$10,000 | 843900001407 | [REDACTED] | 57840 | QAUF | MONTHLY |
| TOTAL | \$10,000 | | | | | |

NOTES

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WF TRANSACTION

TRANSACTION ID: 00012345 TRANSACTION STATUS: APPROVED UPDATED DTTM: 01/15/2017 11:03 AM

ORIGINATOR

NAME: [REDACTED] PHONE: [REDACTED]

WF TRANSACTION

TRANSACTION ID
00012345

TRANSACTION STATUS
APPROVED

UPDATED DTTM
01/15/2017 11:03 AM

ORIGINATOR

NAME

PHONE

[REDACTED]

APPROVERS

| SEQ | ROLE | DEPT ID | NAME | APPROVER ACTION |
|-----|-------------------------------------|---------|------------|-----------------|
| 10 | GFS Home Dept Approver | PHYSICS | [REDACTED] | Approved |
| 10 | GFS Home Dept Approver | PHYSICS | [REDACTED] | |
| 10 | GFS Financial Approver 843900001407 | QUAF | [REDACTED] | Approved |
| 10 | GFS Financial Approver 843900001407 | QUAF | [REDACTED] | |

GFS Redesign

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How can you participate?

- **Tell us...** your business reporting needs related to GFS-specific information
- **Submit...** your own test case
- **Provide your availability...** for user testing
- **Prepare...** to think differently
- **Look out...** for emails to *gradfinsupport* list
- **Volunteer...** for training module design

GFS Redesign

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How can you participate?

Contact Information:

For postdoc-related items, email:

Shannon Monahan at smonahan@stanford.edu

For training-related items, email:

Nancy Child at nchild@stanford.edu

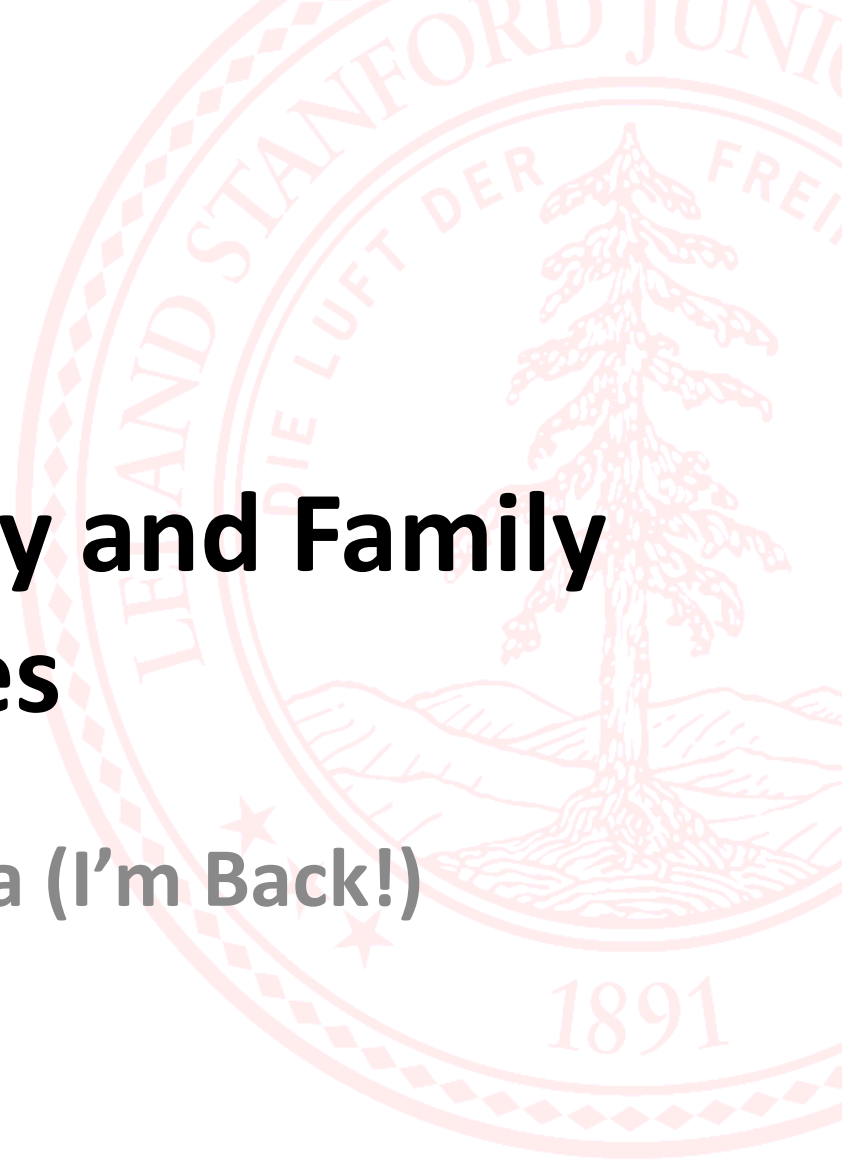
GFS Redesign

Questions?



Postdoc Disability and Family Leaves

Cecilia “Cecy” Avila (I’m Back!)



Postdoc Disability and Family Leaves- Salary Paid

– Voluntary Disability Insurance (VDI)

- Postdoc's own health condition (illness or injury, including pregnancy)
- Up to 60% of pre-disability pay for up to 52 weeks minus the waiting period
- Maximum: \$1,173 per week; Minimum: \$50 per week
- Pre-existing limitation: Benefits will be limited to State Plan rate or minimum of \$50 a week

– Family Temporary Disability (FTD)

- To bond with newborn, fostered or adopted child
- An immediate family member suffering from a serious health condition
- Up to 60% of pre-disability pay for up to 6 weeks minus the waiting period
- Maximum: \$1,173 per week; Minimum: \$50 per week

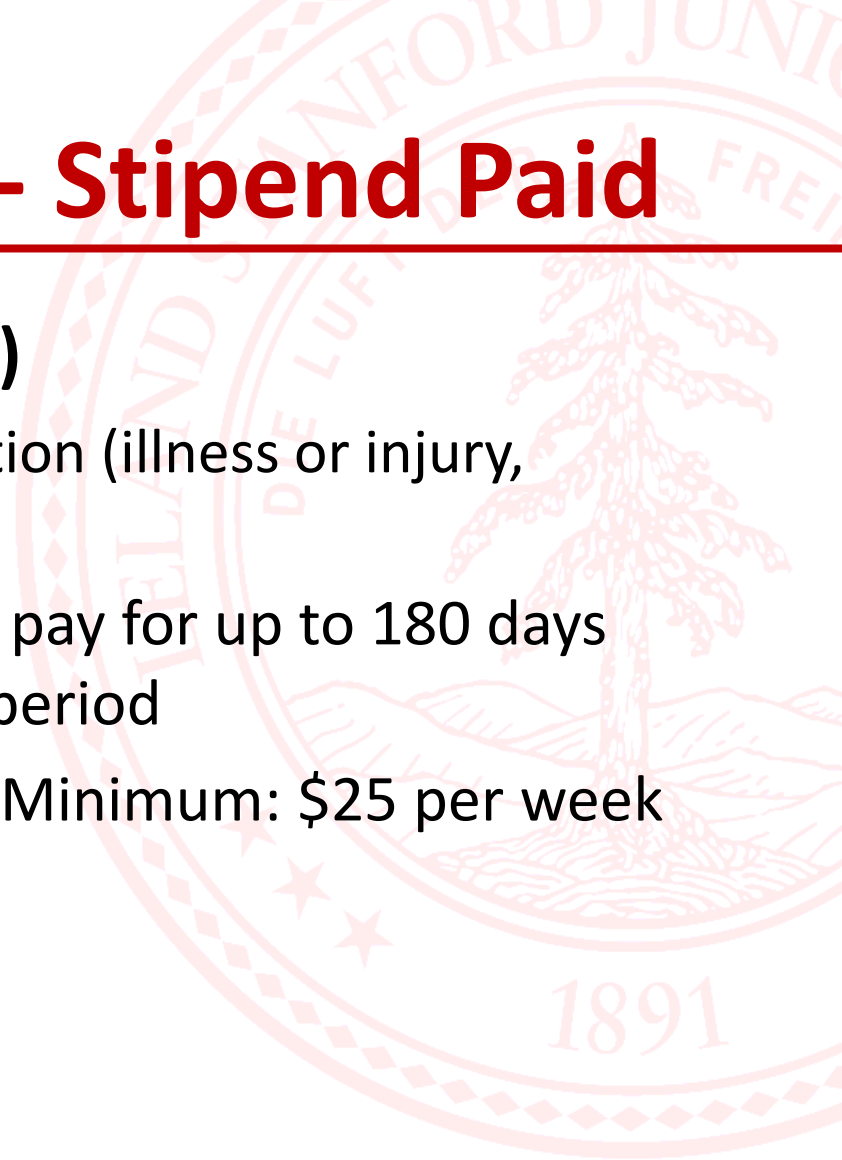
– Family Medical Leave (FMLA)

- Provides up to 12 weeks of job protection if postdoc has been at Stanford for at least one year and has worked 1,250 salary hours in past 12 months from leave

Postdoc Disability - Stipend Paid

– Short Term Disability (STD)

- Postdoc's own health condition (illness or injury, including pregnancy)
- Up to 60% of pre-disability pay for up to 180 days minus the benefit waiting period
- Maximum \$987 per week; Minimum: \$25 per week



Postdoc Long Term Disability

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– Long Term Disability

- Benefits Begin on 181st day of disability
- Up to 50% of monthly pay
- Maximum: \$2,500 per month; Minimum: \$100 per month
- Pre-existing condition limitations

Postdoc Disability (con't)

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– PI and Department Administrators

- Refer postdoc to Postdoc Benefits Office at postdocbenefits@Stanford.edu or (650) 724-9490 for assistance with filing a disability or family leave

– Postdoc Benefits Office

- Will provide departments with GFS calculations to supplement disability payments

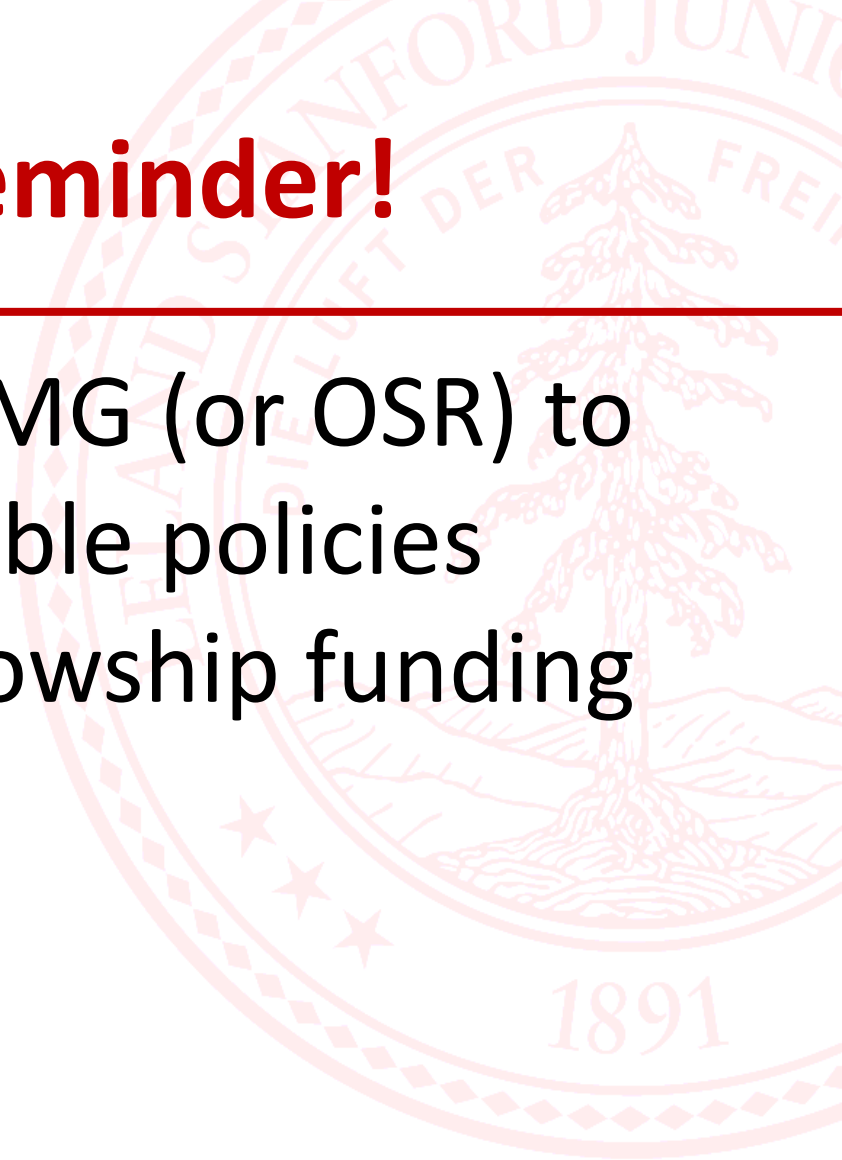
Unpaid Personal Leave of Absence



- If postdoc is paid as salary and leave is related to family care please refer the postdoc to the Postdoc Benefits Office
- Email Denise Livengood at denise17@stanford.edu if:
 - Postdoc will be on unpaid personal leave for more than one full pay period
 - Postdoc will be responsible for paying full cost of health premiums

Important Reminder!

- You **MUST** contact RMG (or OSR) to check on any applicable policies when fellows on fellowship funding go on leave



Travel Ban Update

Tammy Wilson



Travel Ban Update

- The U.S. Supreme Court will review the EO Travel Ban for nationals of Iran, Libya, Somalia, Sudan, Syria, and Yemen
- Some parts of the travel ban were implemented June 29, 2017
- SCOTUS said the partial travel ban “may not be enforced against foreign nationals who have a credible claim of a bona fide relationship with a person or entity in the U.S.”
 - This includes students from the designated countries who are admitted to a U.S. University
- Bechtel I-Center is the first point of contact for all international scholars impacted by the travel ban
 - Email Bechtel staff at travelban@stanford.edu
- Stay up-to-date: <http://immigration.stanford.edu/>

New OPA Website

Tammy Wilson



New OPA Website

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- Anticipated launch: Late July – Early August
- We need your “Two Cents!”
 - What are the most common reasons that you visit the OPA Website?
 - TELL US NOW!
 - Get out your SmartPhone and text:
OFFICEOFPOST120 to 22333
 - You will receive a confirmation text
 - Then text us the most common reasons for visiting our website

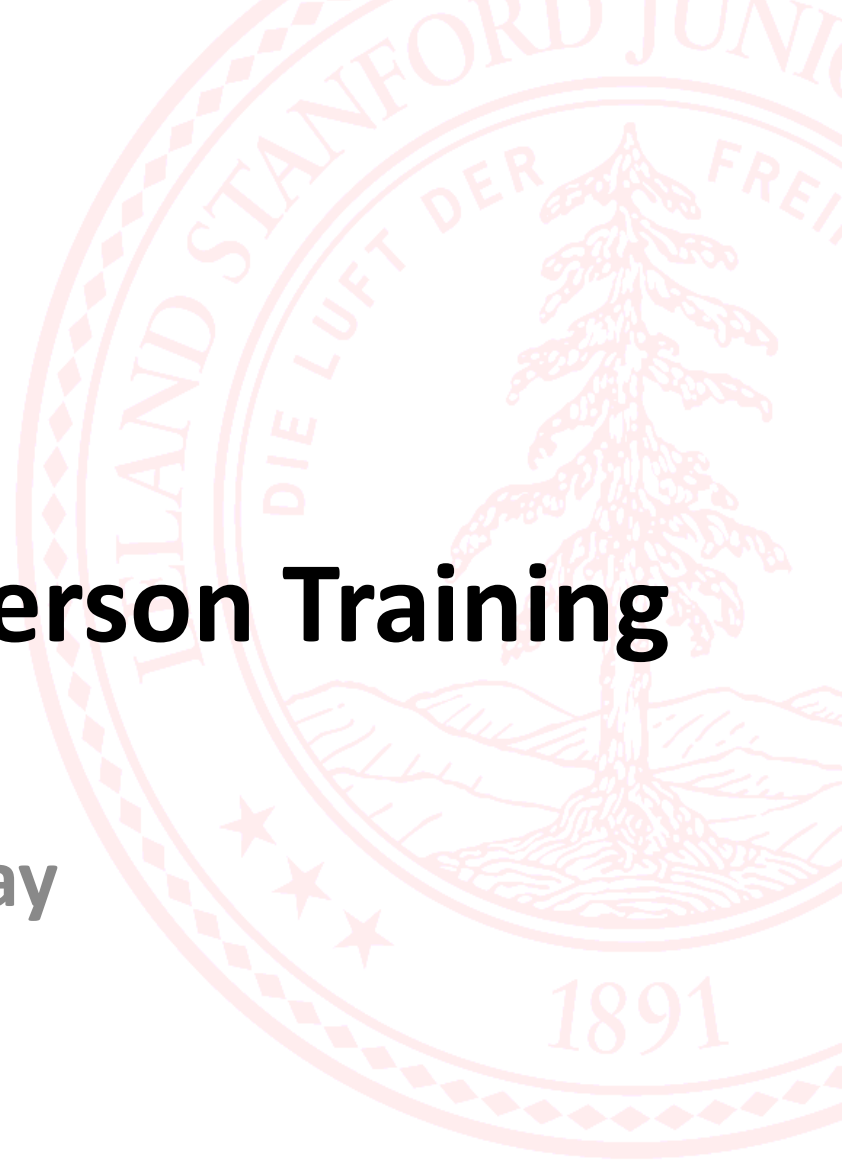
New OPA Website

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- We are looking for *A Few Good Web User Testing Volunteers!*
 - Email tjwilson@stanford.edu to sign up!
 - Feel free to send your Top 5 Reasons for Visiting the OPA website, and any other feedback you wish to share, by email if you did not participate in the live Poll

Open Lab and In-Person Training

Al Murray



Open Lab and In-Person Training



Open Lab and Classroom Postdoc Admin Training
for Postdoc Policy and Web Forms:

- First Friday of every month, 8:00 am – 10:30 am
- No computers in LKSC or MSOB rooms, feel free to bring a laptop
 - **LKSC Room 209**
 - August 4, 2017
 - **1265 Welch Road, MSOB, x140**
 - September 1, 2017
 - October 6, 2017
 - November 3, 2017

Open Lab and In-Person Training

PeopleSoft Open Labs for GFS and GFS BI Reports have changed to 1:1 Zoom Sessions:

- Submit HelpSU to PeopleSoft GFS for remote session
 - Request Category: Administrative Applications
Request Type: PeopleSoft GFS
 - Or click on: <https://helpsu.stanford.edu/helpsu/3.0/helpsu-form?pcat=PS-GFS>

Other Resources:

<http://gfs.stanford.edu>

<http://gfs.stanford.edu/gfspostdocs.html>

Open Forum

Questions?

HelpSU.stanford.edu

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

PLEASE DO NOT email postdocaffairs@Stanford.edu for urgent matters.