

The background of the slide features a large, faint watermark of the Stanford University seal. The seal is circular and contains a redwood tree in the center, with the text "STANFORD UNIVERSITY" at the top, "LUFTE DER FREI" on the sides, and "1891" at the bottom. The seal is surrounded by a decorative border.

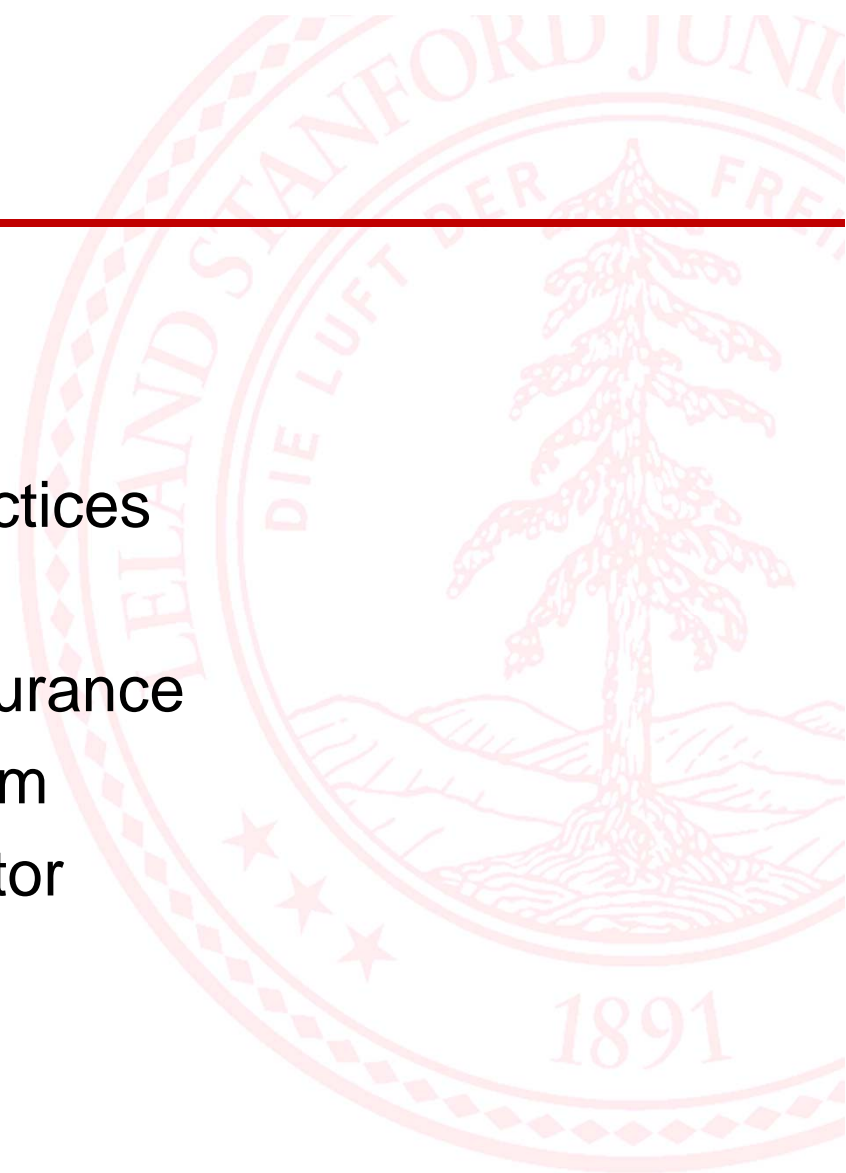
# Postdoctoral Administrators Quarterly Meeting

July 25, 2013  
10:00 a.m. – 11:00 a.m.  
LKSC 120

# Agenda

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- Certificates
- Access Redesign
- Postdoc Web Forms Best Practices
- Visa & Citizenship Audit
- Paying for Postdoc Health Insurance
- OPA Paper H-1B Request Form
- Research Experience Calculator
- Open Lab 1:1 Trainings
- Benefits
- Programs



# Certificates

Shannon Monahan



# Certificates

- (New) Process:
  - Certificates printed quarterly
  - New dean signs certificates after printing individually by hand
  - One-off printings prior to the batch printing cannot be accommodated
    - Please have the postdoc contact Shannon Monahan at [smonahan@stanford.edu](mailto:smonahan@stanford.edu) if there are any issues
- Remember: certificates cannot be printed prior to the postdoc's approved termination date

# Certificates

- Certificate Printing Timeline:
  - Termination report is run 2-3 weeks after the close of the quarter
  - Termination file is processed and printing begins
  - Certificates are then sent to the dean for signatures
  - After certificates are returned, they are mailed out to department administrators
  - Anticipate a 4-5 week turnaround from the close of the quarter to time of receipt

# **AXESS.stanford.edu Redesign**

**Shannon Monahan**



# AXESS.stanford.edu Redesign

- From Administrative Systems: “The AXESS Redesign and PeopleTools 8.53 project production release has been delayed. The new release date is scheduled for August 12.”
- Please watch your email inbox for information sent to the entire University about the upcoming changes to AXESS.stanford.edu.
- The changes to AXESS will not change PD WebForms.

# Postdoc Webforms: Best Practices

Shannon Monahan

Al Murray





# Postdoc Webforms

- Recommendation Form:
  - Funding
    - Only salary/stipend should be entered as funding
    - Exclude: research allowance, health insurance, supplies
- Termination Form:
  - If sending a revised termination form, put “REVISED” in the *Comments to Approvers and OPA* section
  - Use Department Transfer when:
    - The postdoc is staying on at Stanford as another postdoc (not as an RA)
    - The postdoc is moving from a Clinical Fellow appointment to an Advanced Training or Postdoctoral Research appointment \*\*
    - **NOTE:** OPA Benefits will terminate postdoc benefits if it does not have “Department Transfer” entered on the Termination Form

\*\*Clinical Fellow → Advanced Training or Postdoctoral Research equals a completely new appointment

# Secure Portal: Data Form Tips (Information Sheet)

- SEND only one invite to postdoc applicant
- REMIND postdoc (multiple times) that his User Name, Password and non-Stanford email address are key to a smooth appointment process
- NEVER Decline a Data Form
- ALWAYS Return a Data Form for correction or completion BEFORE you Approve
- DO NOT Return a Data Form if you can fix the problem on the Recommendation Form

# Secure Portal: Data Form Tips (Information Sheet)

- If you must send a 2<sup>nd</sup> Invite, a different non-Stanford email address must be used AND a new User Name created in SecurePortal by Postdoc
- Lost User Names cannot be retrieved by OPA – significant delays will occur
- Any problems with uploading documents can be resolved without returning Data Form. Use email and your ability to upload on Rec Form
- Consult with OPA if in doubt

# Visa & Citizenship Audit

Shannon Monahan

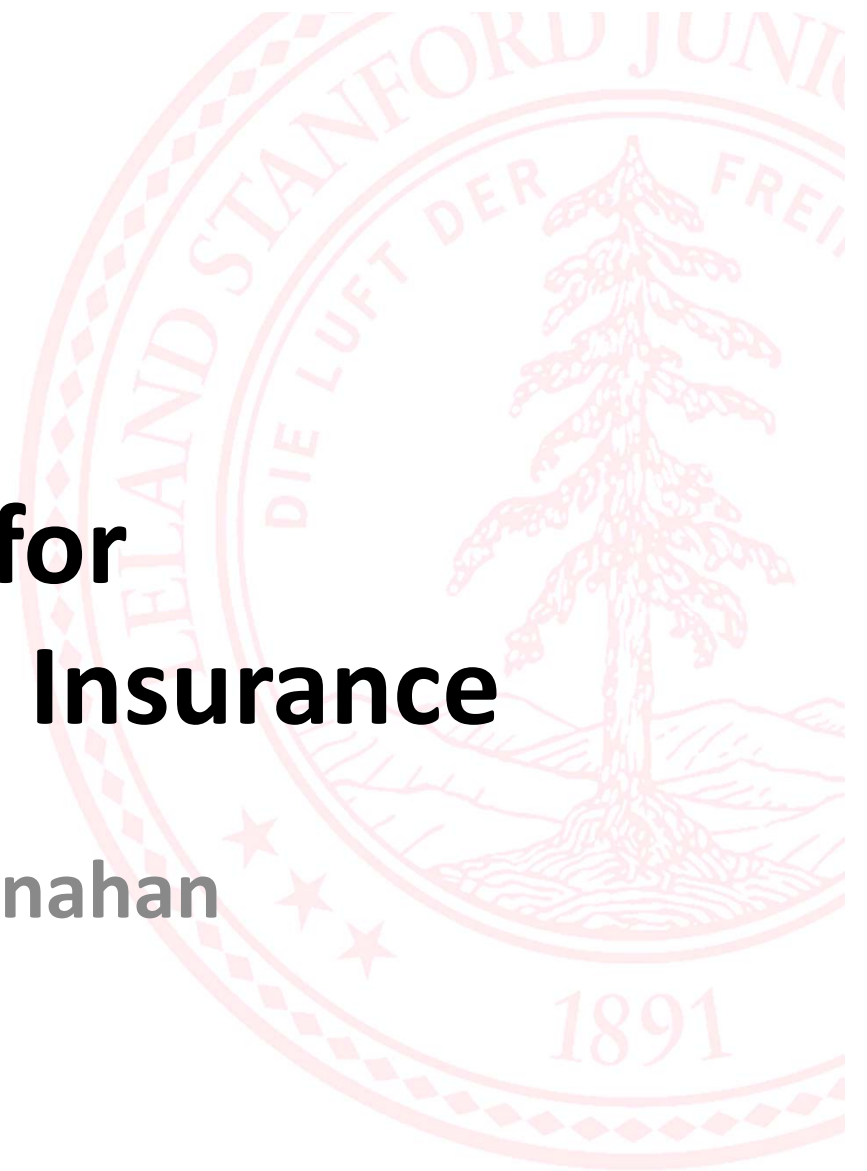


# Visa & Citizenship Audit

- A one time Visa & Citizenship Audit will be done within the next few months
- Institutional Research is cleaning up records in PeopleSoft for institutional and government reporting
- Should be fairly simple—will only need to confirm if all correct or provide a copy of a new visa if not up-to-date
  - OPA will update PeopleSoft
- **NOTE**: In general—all changes in visa types or citizenship status should be reported to OPA
  - Think: OPT → J1, International → Permanent Resident, etc.

# Paying for Postdoc Health Insurance

Shannon Monahan



# Postdoc Health Insurance


- Departments are required to cover the cost of the Institutional portion of the postdoc health insurance **regardless of funding**
  - This is part of the funding package
  - Yes, this means the department or appointing faculty member must still pay for insurance even if the postdoc is outside-funded

	Monthly Cost		
	Total Cost	Institutional Cost/ Allowance*	Your Cost
<b>Medical – Blue Shield EPO</b>			
Postdoc Only	\$634.62	\$634.62	\$0.00
Postdoc + Spouse/Registered Domestic Partner	\$1,396.17	\$1,116.94	\$279.23
Postdoc + Child(ren)	\$1,142.33	\$970.98	\$171.35
Postdoc + Family	\$1,903.88	\$1,618.30	\$285.58
<b>Medical – Blue Shield PPO</b>			
Postdoc Only	\$688.57	\$634.62	\$53.95
Postdoc + Spouse/Registered Domestic Partner	\$1,514.85	\$1,116.94	\$397.91
Postdoc + Child(ren)	\$1,260.43	\$970.98	\$289.45

# Postdoc Health Insurance

- Postdocs can only cover the Institutional cost of the health benefits when they receive an allowance specifically for health benefits
  - Both the distinction for “health benefits” and the total yearly amount must be listed on the funding letter
- Prior approval is required
  - Send the postdoc’s name, appointment dates, and outside funding letter showing the required wording and amount to Shannon Monahan at [smonahan@stanford.edu](mailto:smonahan@stanford.edu) for review



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# **OPA Paper H-1B Request Form Process Updates**

**Tammy Wilson**

# OPA Paper H-1B Request Form

(Page 1)



STANFORD UNIVERSITY  
OFFICE OF POSTDOCTORAL AFFAIRS

## H-1B/E-3 EMPLOYMENT VISA REQUEST FORM FOR POSTDOCTORAL SCHOLARS

Faculty Sponsor Name: \_\_\_\_\_ Department/Division: \_\_\_\_\_

Postdoctoral Scholar Name: \_\_\_\_\_ Student ID #: \_\_\_\_\_

Postdoctoral Administrator Name: \_\_\_\_\_ Email: \_\_\_\_\_

Incoming postdoc  Current postdoc

Requested Visa:  H-1B  E-3  Other (specify) \_\_\_\_\_

Type of Request:  Initial  Extension  Porting

If extension, current H-1B, E-3, or Other visa end date: \_\_\_\_\_

If initial request, current visa status and end date:

J-1  F-1 OPT  Other (specify) \_\_\_\_\_

End Date \_\_\_\_\_

If J-1 holder, has waiver been obtained?  Yes  No

### New or Extended H-1B, E-3, or Other Visa Dates & Funding Information:

Visa Start Date: \_\_\_\_\_ Visa End Date (must match appointment end date): \_\_\_\_\_

Source of Funding (name of agency(ies); discretionary faculty accounts): \_\_\_\_\_

# OPA Paper H-1B Request Form

## (Page 1)

Reason(s) for Request: Check all that apply. Evidence of all checked items must be submitted with this form (see Checklists on Page 2).

- 1. The postdoctoral scholar is currently in H-1B or E-3 or other employment visa status as specified above.
- 2. The postdoctoral scholar has pending naturalization and states permanent residence as evidence by the attached I-485 receipt.
- 3. The postdoctoral scholar is a naturalized citizen or a US permanent resident.
- 4. The postdoctoral scholar has a PhD or equivalent degree in the United States on an F-1 visa and is currently completing six months of optional practical training at Stanford or elsewhere.
- 5. The postdoctoral scholar is ineligible for a J-1 waiver.
- 6. The postdoctoral scholar is ineligible for a J-1 waiver.  Other (specify below)  
\_\_\_\_\_
- 7. Retention: postdoctoral scholar has a commitment from outside Stanford with an H-1B employment visa commitment.
- 8. No other qualified candidates are available or identified.

OPA

Review Board

# OPA Paper H-1B Request Form

(Page 3)

**H-1B/E-3 EMPLOYMENT VISA REQUEST FORM FOR POSTDOCTORAL SCHOLARS**

**FACULTY SPONSOR STATEMENT  
FOR ALL REQUESTS WITH ANY OF REASONS 5 - 8 CHECKED ON PAGE 1**

Describe the unique contribution/skill sets possessed by the postdoctoral scholar as demonstrated through a formal application and selection process for the postdoctoral position.

Describe any significant hardship on the progress of the research project if the postdoctoral scholar were to decline a Stanford offer or depart from a current Stanford appointment.

# OPA Paper H-1B Request Form

## (Page 2)

H-1B/E-3 EMPLOYMENT VISA REQUEST FORM FOR POSTDOCTORAL SCHOLARS

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### SUBMITTING THE REQUEST TO OPA

**PLEASE REFER TO THE CHECKLISTS BELOW FOR SUPPORTING DOCUMENTS**

**TO BE SUBMITTED IN ONE PDF FILE WITH THIS REQUEST FORM**

*INCOMPLETE SUBMISSIONS MUST BE CORRECTED PRIOR TO EVALUATION BY THE REVIEW BOARD.*

**NEW APPOINTMENT:**

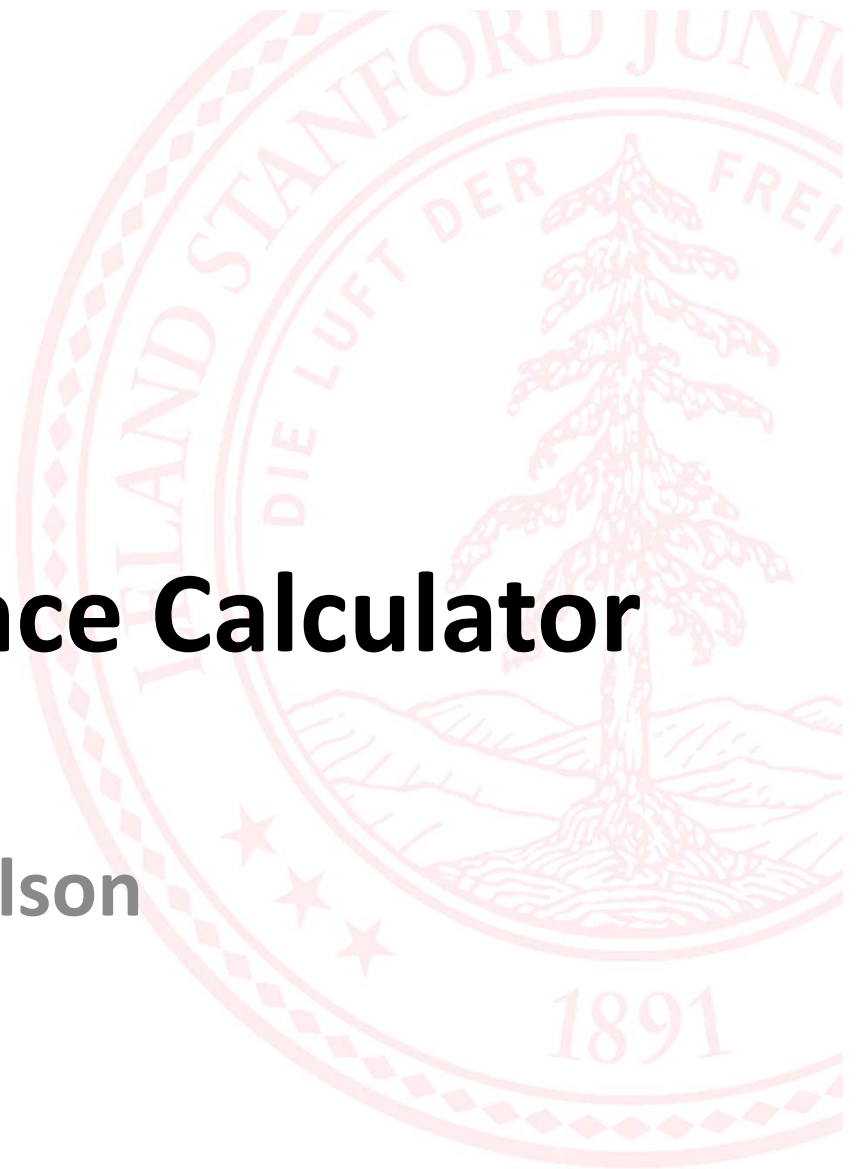
1. Upload to the Recommendation web form (via AXESS/Postdoc Administrative Forms) in one PDF file, this completed and signed form with supporting document(s) listed below that correspond to the Reason(s) for Request checked on Page 1.
2. Send a notification email to Tammy Wilson at [tjwilson@stanford.edu](mailto:tjwilson@stanford.edu)

**APPOINTMENT EXTENSION:**

1. Upload to the existing Recommendation web form (via AXESS/Postdoc Administrative Forms) in one PDF file, this completed and signed form with supporting document(s) listed below that correspond to the Reason(s) for Request checked on Page 1.
2. Submit a Change Request web form.
3. Send a notification email to Tammy Wilson at [tjwilson@stanford.edu](mailto:tjwilson@stanford.edu)

# Research Experience Calculator

Tammy Wilson



# Research Experience Calculator

- For use with new appointments when incoming postdoc has previous research experience.
- For use with appointment extensions when research experience needs to be recalculated.
- Helps calculate exact end date for fifth year extensions.
- Coming to the OPA website soon!
  - Email [tjwilson@stanford.edu](mailto:tjwilson@stanford.edu) for your copy now.

# Research Experience Calculator

## Postdoctoral Research Experience Calculator

Instructions Below

<b>Date of Request</b>	<b>Type of Request</b> (ex: New Appointment with Previous Research Experience, Reappointment, Term Limit Policy Exception Request, etc.)

<b>Postdoc Name</b>	<b>Department Name</b>	<b>Postdoc Administrator Name</b>	<b>Faculty Sponsor(s) Name</b>

<b>Name of Doctoral Degree Institution</b>	<b>Date of Doctoral Degree Conferral</b>	<b>US Citizen or Current Visa Status?</b> (ex: US Citizen; J-1 Visa; F-1 OPT; etc.)	<b>Visa Issue to Address with this Request?</b> (ex: Change of Visa Status; J-1 Visa Waiver, etc.)

<b>Research Position(s)</b> (all previous and current)	<b>Institution Name</b>	<b>Start Date</b> (mm/dd/yy)	<b>End Date</b> (mm/dd/yy)	<b>Research Experience</b> (in years)	<b>Research Experience</b> (in months)	<b>Discounted Time</b> (in months, enter digits only)	<b>COMBINED RESEARCH EXPERIENCE</b> (in months)
				0.00	0.00		0.00
				0.00	0.00		0.00
				0.00	0.00		0.00
				0.00	0.00		0.00
				0.00	0.00		0.00
<b>COMBINED RESEARCH EXPERIENCE FROM ALL POSITIONS</b> (If reappointment or transfer include current Stanford appointment dates above)							<b>0.00</b>

<b>Reason(s) for any Discounted Time Noted Above:</b> (ex: up to 12 months in PhD lab discounted per policy; time discounted for unpaid leave, etc.)	<b>Brief Explanation of any Significant Change in Field to be Considered in this Request:</b> (Requests for sixth training year require full explanation and other supporting documents. See link below.)

<b>Requested New Appointment or Reappointment with Term Limit Policy Exception</b>					
<b>Requested Start Date</b> (mm/dd/yy)	<b>Requested End Date</b> (mm/dd/yy)	<b>Research Experience</b> (in years)	<b>Research Experience</b> (in months)	<b>Combined Research Experience</b> (from above)	<b>COMBINED RESEARCH EXPERIENCE WITH NEW TERMS</b> (in months)
		0.00	0.00	0.00	<b>0.00</b>
<p>Postdoctoral appointment term limit is 48 months. Requests for 49-60 months combined research experience with new terms can be approved with supporting documents to OPA managers. Requests beyond 60 months require faculty subcommittee review. For more information please see: <a href="http://doresearch.stanford.edu/policies/research-policy-handbook/non-faculty-research-appointments/postdoctoral-scholars">http://doresearch.stanford.edu/policies/research-policy-handbook/non-faculty-research-appointments/postdoctoral-scholars</a>.</p>					
<b>Additional Notes:</b>					



# Open Lab 1:1 Trainings

Tammy Wilson

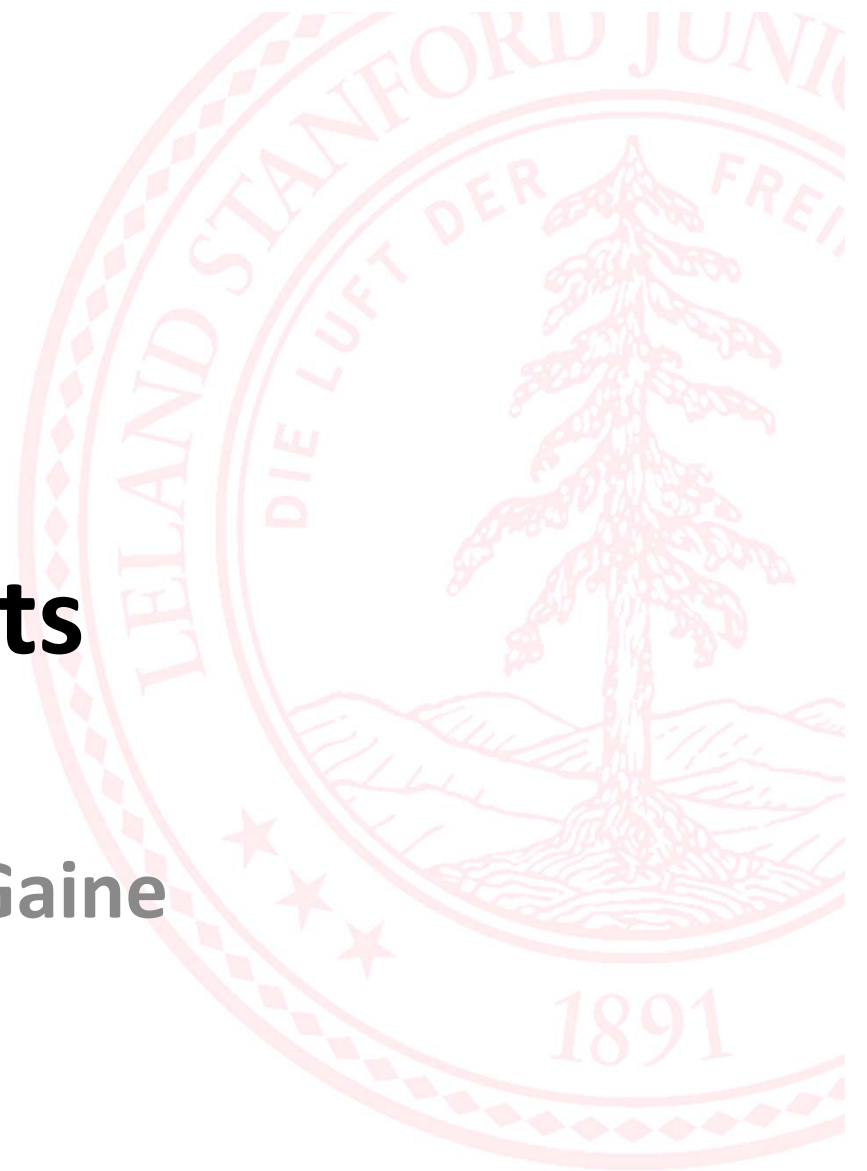


# Open Lab 1:1 Trainings

- Birch Modular, Lab B, 215 Panama Street
- Walk-Ins Welcome: First Friday of every month, 9a-12p
- **New!** 1:1 Work or Training Session on **any** Friday, 9a-12p
  - Work Sessions: get in-person help with postdoc policy questions and postdoc web forms transactions
  - Training Sessions: open to new administrators needing policy and web forms training components for authority, and veteran administrators interested in a refresher
  - To schedule a 1:1 session, contact your postdoctoral services manager:
    - SOM – Al Murray at [alistair@stanford.edu](mailto:alistair@stanford.edu)
    - University – Tammy Wilson at [tjwilson@stanford.edu](mailto:tjwilson@stanford.edu)

# Benefits

Sandra DeGaine



# Benefits

- Postdocs not enrolled or waived in the benefits system within 31 days will automatically be defaulted into the Blue Shield EPO plan for postdoc only coverage.
  - Exception: Postdocs waiting for their SSN
- If a postdoc is pregnant and her pay type is changed (salary to stipend or stipend to salary) this can affect her disability benefits during maternity leave and may impact how much salary the PI is required to cover.

# Benefits

- If a postdoc is submitting a request for medical LOA please advise them to contact our office for disability information.
- Make sure to indicate “Department Transfer” on the Termination if the postdoc is transferring to another postdoc position at Stanford. When a postdoc is terminated from the benefits system it is highly labor intensive to add them back if they are just transferring to another department.

# Benefits

- A reminder that administrators are welcome to attend any benefits orientation session or group maternity information session. Dates are listed on our website.
- A new SHC only plan “Stanford Healthcare Alliance” will be replacing the EPO plan for 2014. We will be requesting your assistance with the communication and open enrollment process for 2014.

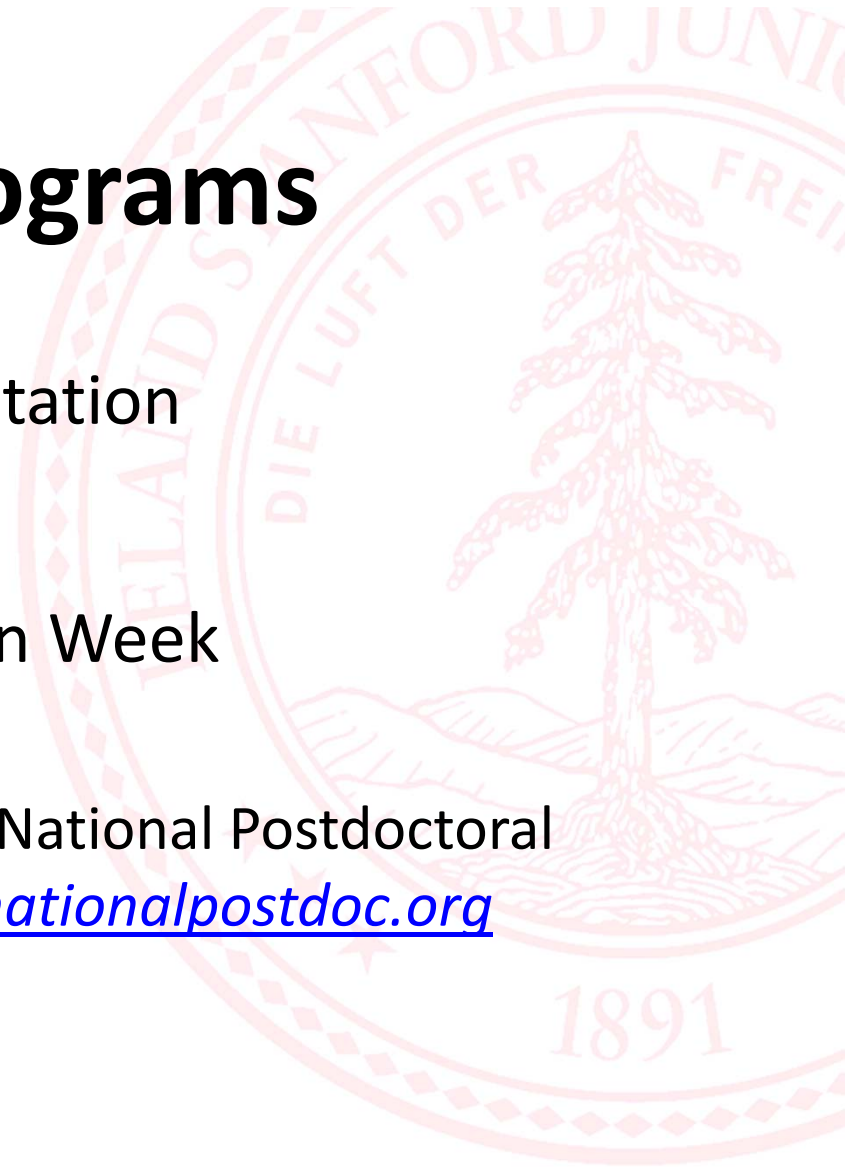
# Programs

OPA



# Postdoc Programs

- Next Quarterly Postdoc Orientation
  - Thursday, September 19, 2013
- National Postdoc Appreciation Week
  - September 16-20, 2013
  - For more details, please check National Postdoctoral Association website at: [www.nationalpostdoc.org](http://www.nationalpostdoc.org)





# Open Forum

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**Questions?**

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**[AskJane.stanford.edu](https://askjane.stanford.edu)**

**[HelpSU.stanford.edu](https://helpsu.stanford.edu)**

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