

# Postdoctoral Administrators Quarterly Meeting

A large, faint watermark of the Stanford University seal is visible in the background on the right side of the slide. The seal features a redwood tree in the center, surrounded by the text 'LUDWIG STANFORD JUNIOR' at the top and '1891' at the bottom. The seal is circular with a decorative border.

November 9, 2017  
10:00 a.m. – 11:30 a.m.  
Alway M114

# Agenda

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- ❖ **Welcome – Annelies**
- ❖ **GFS Redesign – Shannon**
- ❖ **Pay Line End and Appointment End Dates - Shannon**
- ❖ **New Position Posting Page – Tammy**
- ❖ **Research Experience Calculator – Tammy**
- ❖ **New Postdoc Admin Info – Tammy**
- ❖ **Winter Closure Deadlines & Policies - Tammy**
- ❖ **Multiple & Duplicate ID Numbers – AI**
- ❖ **Open Lab and In-Person Training Classes – AI**
- ❖ **Mental Health Resources for Postdocs – Annelies**

# Welcome!

Annelies Ransome  
Associate Director for Operations



# GFS Redesign

Shannon Monahan  
Reporting Analyst



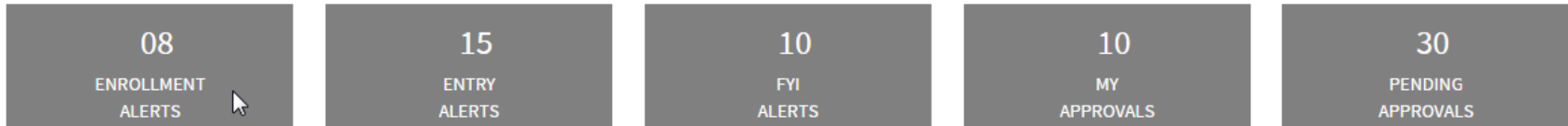
# GFS Redesign

A large, faint watermark of the Stanford University seal is visible in the background. The seal features a redwood tree in the center, surrounded by the Latin motto "DIE LUXTA VERITAS" and the year "1891". The words "ILLIAND STANFORD JUNIO" are also visible at the top of the seal.

- Interface: modern and intuitive; minimizes data entry and clicks
- Pay line entry: all entry done in a single view
- Alerts: Users and approvers will be alerted of pending actions/updates
- Training delivery: online and aligned with user role assignment and utilize STARS

# GFS Redesign

## GFS Center



## GFS Aid Entry Search

Graduate Student

Search

+ [Advanced Search](#)

PostDoctoral Scholar

Non-Matriculated Student

## GFS Menu

Look up Item Type **NEW**

Request Item Type **NEW**

GFS Offcycle check **NEW**

Batch Upload **NEW**

Legacy GFS **NEW**

## Workflow


My Approvals **NEW**

My Request pending **NEW**

## Training

PeopleSoft Concepts and Compliance **NEW**

# GFS Redesign

Hello, Cesar  Sign Out  
Preferences

## GFS Enrollment Alerts

 Export to Excel

2018-1182-05805002-Ferris Bueller

[Read more](#)

Student has approved aid, but is in withdraw status for the quarter. Verify enrollment status and adjust aid entry as appropriate.

[X DISMISS](#)

2018-1182-00000000-Cameron Frye

[Read more](#)

Student has an approved 50% assistantship, but is registered for greater than 10 units. Verify enrollment status and adjust aid entry as appropriate.

[X DISMISS](#)

2018-1182-99999999-Sloane Peterson

[Read more](#)

Student has approved aid, but is registered for less than 7 units. Verify enrollment status and adjust aid entry as appropriate.

[X DISMISS](#)

<<

Rows



# GFS Redesign

A large, faint watermark of the Stanford University seal is visible in the background. The seal features a tree in the center, surrounded by the text 'LELAND STANFORD JUNIOR' at the top and '1891' at the bottom. The words 'DIE LUFT DER FREIHEIT' are also visible around the tree.

## Sample Postdoc Alerts:

- Support does not meet required minimum annual funding amount.
- Salary was approved after the payroll deadline. Please review to determine if a retroactive payment is due or an overpayment has been made.



# GFS Redesign

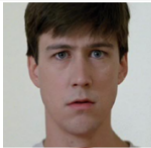

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## Other Sample Alerts:

- Student's Academic Program has changed; Please review or edit Home Org if needed.
- Aid has been entered AND student is not enrolled.

# GFS Redesign

## POST DOC INFO

ID	NAME	
05808666	Cameron Frye	
US CITIZENSHIP STATUS	DIRECT DEPOSIT	
International		

## TERM SUMMARY

### ALL AID SUMMARY

STIPEND & SALARY SUPPORT	ANNUALIZED AMT	YEARLY AMOUNT
MONTHLY STIPEND	\$0.00	\$0.00
ASSIST SALARY	\$15,900.00	\$13,250.00
OUTSIDE FUNDING	\$49,100.04	\$40,916.70
<b>TOTAL</b>	<b>\$65,000.04</b>	<b>\$54,166.70</b>
OTHER SUPPORT	TOTAL AMT	TOTAL AMT
OTHER PAYMENTS	\$0.00	\$0.00

# GFS Redesign

Stipend <u>Salary</u> Outside Funding Other Payments								
+ Add ✓ Save & Submit 📄 Save ✕ Cancel 🗑️ Delete								
AID SEQUENCE	START DATE	START DATE	END DATE	ANNUAL AMT	MONTHLY AMT	PAY ORG	LINE STATUS	ACTIONS
▼ SAL001		10/01/2017	07/31/2018	15900	662.5	RAAA	Approved	<input type="checkbox"/> ⚙️
AID SEQUENCE	IDENTIFIER	PAY ORG	ASSISTANTSHIP TYPE	HRS PER WEEK	MIN PAY PERIOD AMOUNT	ANNUAL AMOUNT		
SAL001		RAAA	PostDoc Res Aff Contingent	10	556.31	15900		
START DATE	END DATE	INFO ONLY						
10/01/2017	07/31/2018	<input type="checkbox"/>						
DETAIL								
SEQ NO	AMOUNT	ITEM TYPE	PTA	EXPEND TYPE	TASK ORG	CHRG PRIORITY		
1	3975	832000030281		51260	SDMM	RAFC_SAL		
2	3975	832000030281		51260	SDMM	RAFC_SAL		
3	3975	832000030281		51260	SDMM	RAFC_SAL		
4	1325	832000030281		51260	SDMM	RAFC_SAL		

# GFS Redesign

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## Expect some changes:

- How does one think about a postdoc's salary/stipend? Annually! Enter the annual amount into GFS and let the system calculate the pay period amounts for you.
- *Outside Funding* is now its own tab!
- *Other Payments* is now its own tab!
  - Enter bonuses, hardship aid, relocation...

# GFS Redesign

## Project Timeline:

What	Who	When
User Acceptance Testing	Business Analysts	Nov 15 – Dec 3
User Acceptance Testing	Expert Users	Dec 4 – 15
UI Design Review	Novice Users	Week of Dec 4
Debug Issues	AS/Developers	Dec 18 – Jan 12
Round 2 UAT Testing	Analysts/Experts	Jan 15 – Feb 16
Training Review	Novice Users	Feb 1 – 16
Training Go Live	All	Mid February
There will also be opportunities to test BI Reporting in January and February		

# GFS Redesign

## Who to talk to?

### Project Stakeholders

Karen Cooper	Financial Aid Office
Kelly Wright	Financial Management Services
TJ Fletcher	Student Financial Services

### Steering Committee

Canice Auyeung	FAO	Shawna Powell-Blunt	Payroll
Nancy Child	FAO	Corrie Potter	IR&DS
Vrinda Gopal	Research & Compliance	Susan Weersing	H&S
Sally Gressens	School of Engineering	Dave Bunger	UIT
Larry Ibarra	Student Information Sys	Leo Volkov	AS
Rebecca Jantzen	VPGE	Prashanth Nellore	AS
Shannon Monahan	OPA	Christina Reynolds	AS

# Pay Line End and Appointment Termination Dates

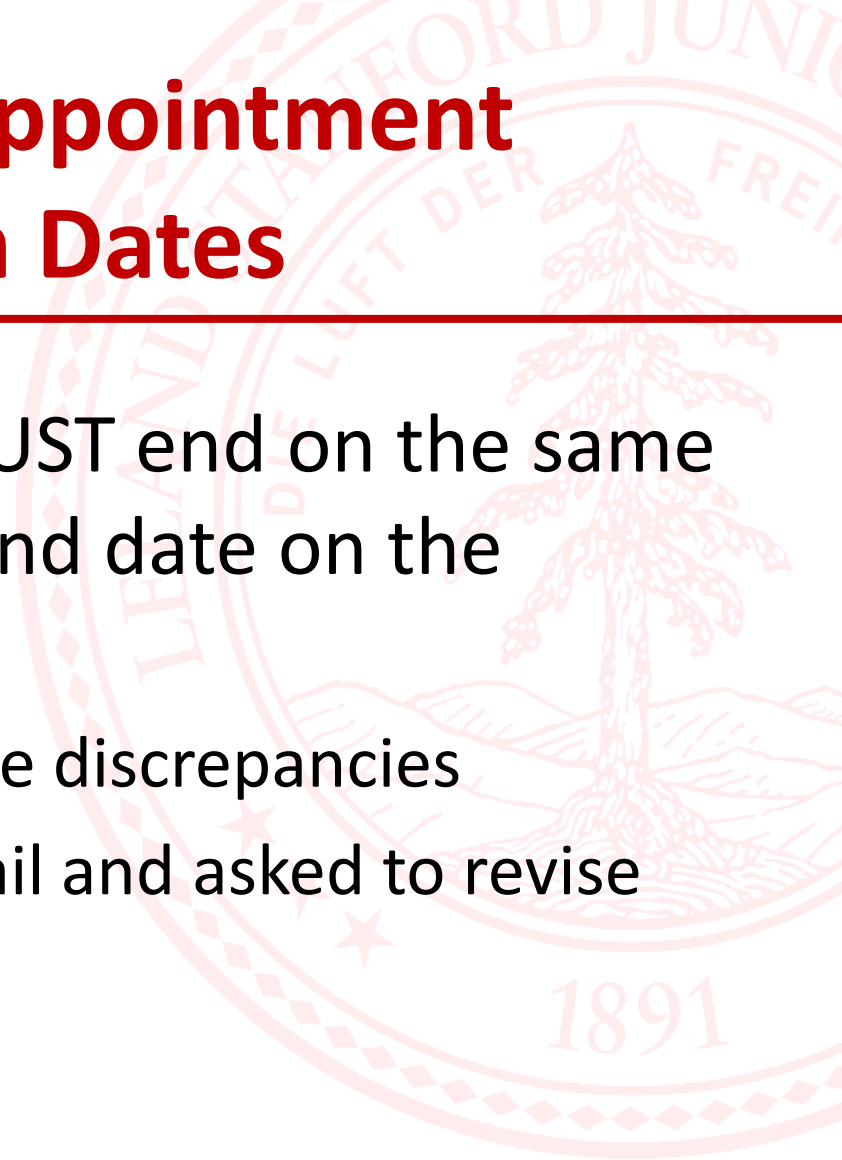
Shannon Monahan  
Reporting Analyst



# Pay Line End & Appointment Termination Dates

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- GFS pay line end dates **MUST** end on the same day as the appointment end date on the termination web form
  - OPA is auditing for end date discrepancies
  - You will be notified by email and asked to revise the incorrect end date





# New Position Posting Page

Tammy Wilson  
Postdoctoral Services Manager



# New Position Posting Page

- <https://postdocs.stanford.edu/postdoctoral-administrators>
  - Click the “Submit a Postdoctoral Position” link
  - Requires SUNet ID login
  - Complete requested data fields, as applicable
  - Save
  - Entries can be edited and deleted, as needed
  - EEOC text is built into every post (please remove this text if included in your posting)

# New Position Posting Page

[Home](#) » [Add content](#)

## Create Open Postdoctoral Position

**Faculty Sponsor (Last, First Name)**

Please enter Last and First name of the faculty who is sponsoring this position

**Department Name**

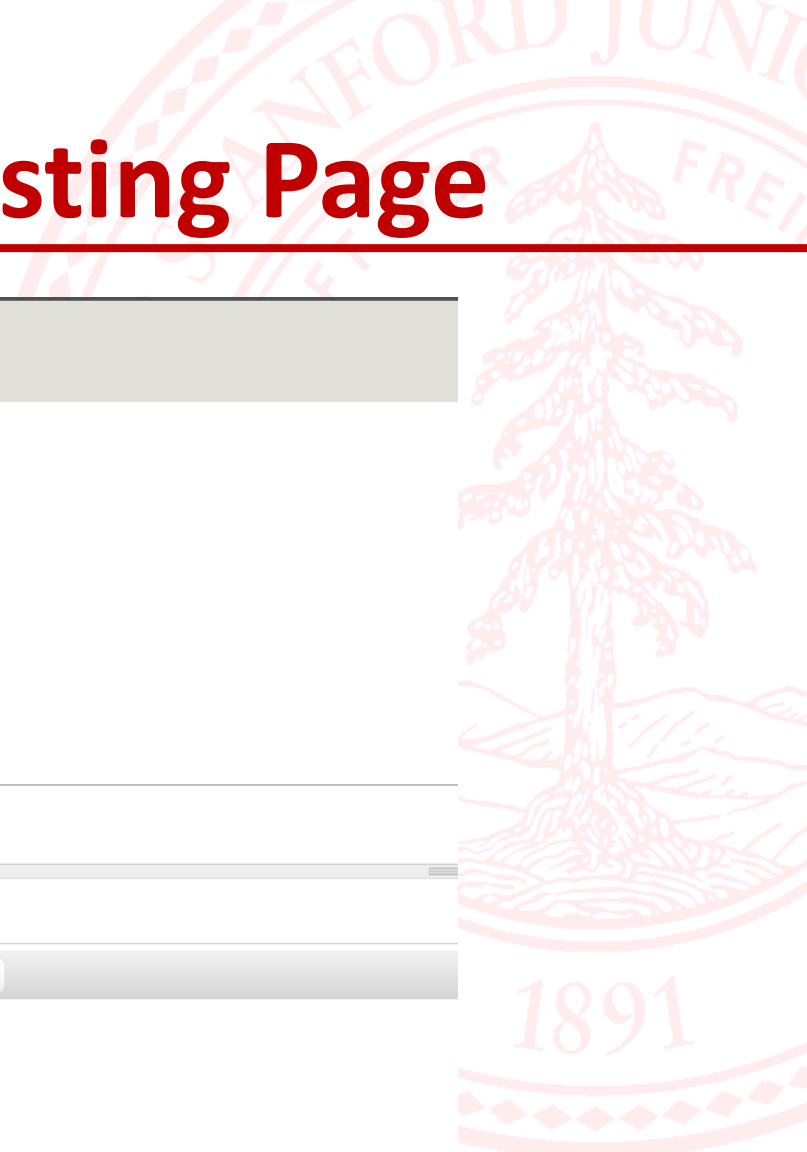
**Appointment Start Date**

**Postdoc Appointment Term**

**Postdoctoral Training Position Description** ([Edit summary](#))

**B** *I* Normal

body p



# New Position Posting Page

**GROUP OR DEPARTMENTAL WEBSITE**

+

[Add another item](#)

**Required Qualifications**

**B I** [List Icons] [Undo] [Redo] [Quote] [Link] [Image] [Table] [Format] [Normal] [Table Icon]

body p

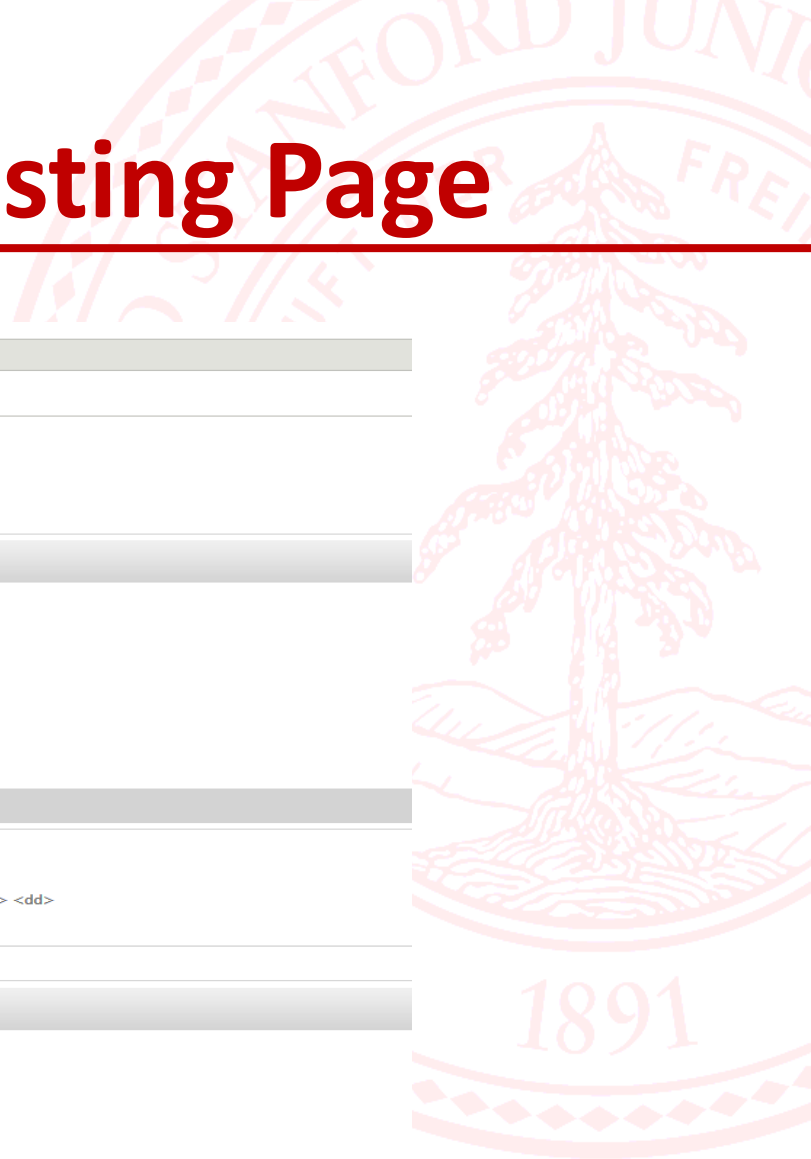
**Disable rich-text**

- Web page addresses and e-mail addresses turn into links automatically.
- Allowed HTML tags: <a> <em> <strong> <cite> <blockquote> <code> <ul> <ol> <li> <dl> <dt> <dd>

- Lines and paragraphs break automatically.

**Required Application Materials**

**B I** [List Icons] [Undo] [Redo] [Quote] [Link] [Image] [Table] [Format] [Format] [Table Icon]



# New Position Posting Page

**How to Submit Application Materials**

**B** *I* [List Icons] [Undo] [Redo] [Quote] [Link] [Image] [Table] [Format] [Preview]

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[Disable rich-text](#)

- Web page addresses and e-mail addresses turn into links automatically.
- Allowed HTML tags: <a> <em> <strong> <cite> <blockquote> <code> <ul> <ol> <li> <dl> <dt> <dd>

- Lines and paragraphs break automatically.

**Other Mentor(s) if Applicable**

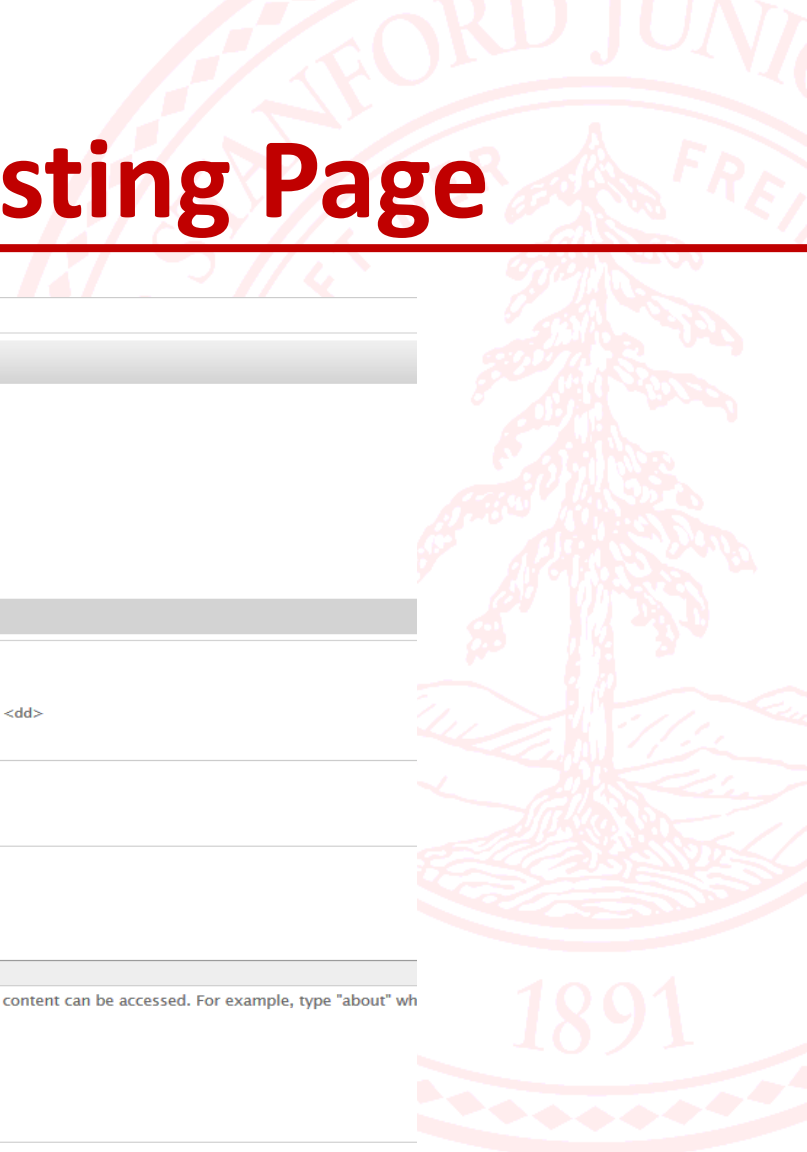
<b>URL path settings</b> Automatic alias
<b>Meta tags</b> Using defaults
<b>Revision information</b> New revision
<b>Authoring information</b> By Tammy Jo Wilson
<b>Publishing options</b> Not published

Generate automatic URL alias  
Uncheck this to create a custom alias below.

**URL alias**

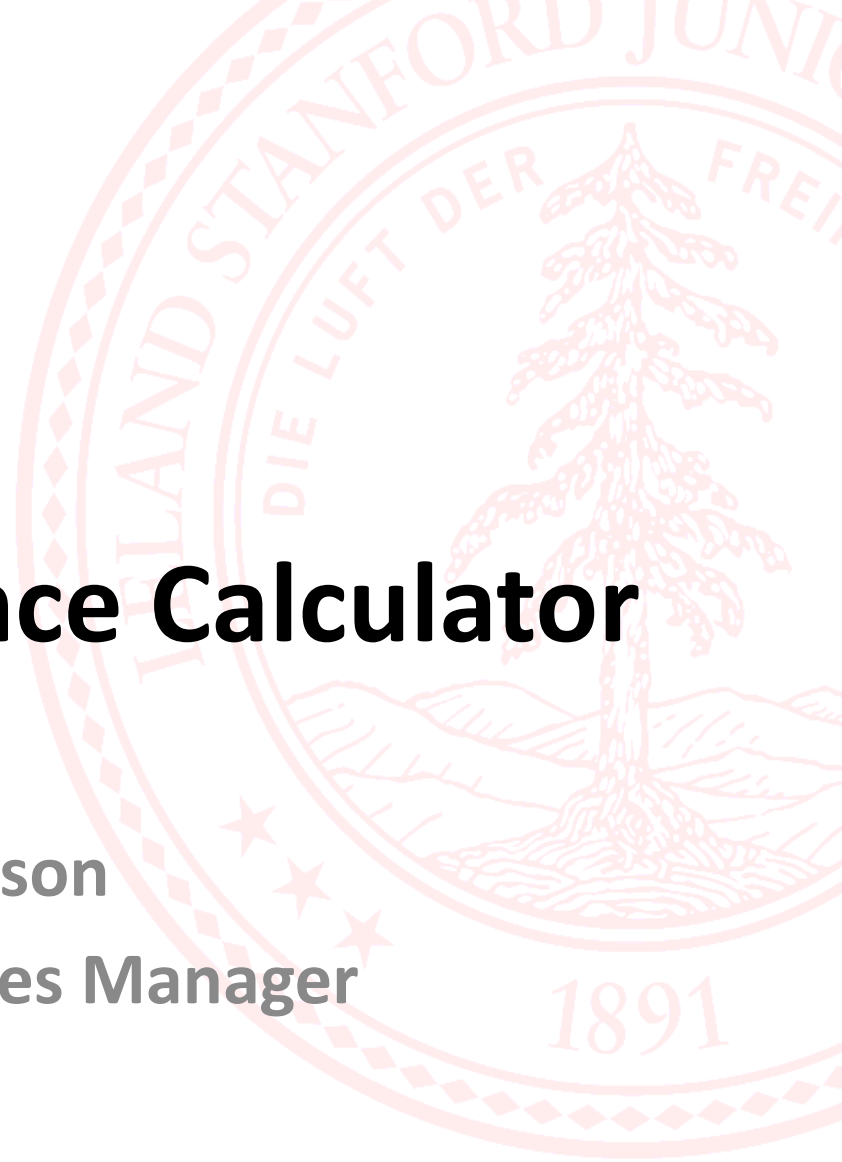
Optionally specify an alternative URL by which this content can be accessed. For example, type "about" wh

Save



# Research Experience Calculator

Tammy Wilson  
Postdoctoral Services Manager



# Research Experience Calculator

- Required for all new appointments and extensions with previous research experience
  - New appointments – complete and upload to recommendation form before submitting for approval
    - Recommendation form field “Previous research noted by dept” entry must match previous research total on calculator
  - Reappointments up to 60 months – complete and upload to approved recommendation form
  - Reappointments 61-72 months – include in 6<sup>th</sup> year extension request packet (do not upload)

# Research Experience Calculator

- <https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/calculate-months-experience-research-non-clinical>
- Specific calculation instructions are available on this web page and on the calculator
- Please complete all applicable entry fields
- Example of properly completed form on next slide



# Research Experience Calculator

## Postdoctoral Research Experience Calculator

Instructions Below

<u>Date of Request</u>	<u>Type of Request</u> (e.g., New Appointment with Previous Research Experience, 6th Training Year Policy Exception, etc.)
11/09/17	New appointment with previous research experience

<u>Postdoc Name</u>	<u>Department Name</u>	<u>Postdoc Administrator Name</u>	<u>Faculty Sponsor(s) Name</u>
Scotty Smalls	Physical Education	Wendy Peffercorn	Benjamin F. Rodriguez

<u>Name of Doctoral Degree Institution</u>	<u>Date of Doctoral Degree Conferral</u>	<u>US Citizen or Current Visa Status?</u> (ex: US Citizen; J-1 Visa; F-1 OPT; etc.)	<u>Visa Issue to Address with this Request?</u> (ex: Change of Visa Status; J-1 Visa Waiver, etc.)
UC Irvine	06/01/13	US Citizen	N/A

<u>Research Position(s)</u> (all previous and current)	<u>Institution Name</u>	<u>Start Date</u> (mm/dd/yy)	<u>End Date</u> (mm/dd/yy)	<u>Research Experience</u> (in years)	<u>Research Experience</u> (in months)	<u>Discounted Time</u> (in months, enter digits only)	<u>COMBINED RESEARCH EXPERIENCE</u> (in months)
Postdoctoral Scholar	Cal Poly	09/01/13	01/31/16	2	29		29
Postdoctoral Scholar	UC Berkeley	02/01/16	10/31/17	2	21		21
				0	0		0
				0	0		0
				0	0		0
<b>COMBINED RESEARCH EXPERIENCE FROM ALL POSITIONS</b> (If reappointment or transfer include current Stanford appointment dates above)							<b>50</b>

New appts: Total here must match Research Experience noted by Department field on Rec Form

# Research Experience Calculator

<i>Requested New Appointment or Reappointment with Term Limit Policy Exception</i>					
<u>Requested Start Date</u> <i>(mm/dd/yy)</i>	<u>Requested End Date</u> <i>(mm/dd/yy)</i>	<u>Research Experience</u> <i>(in years)</i>	<u>Research Experience</u> <i>(in months)</i>	<u>Combined Research Experience</u> <i>(from above)</i>	<u>COMBINED RESEARCH EXPERIENCE WITH NEW TERMS</u> <i>(in months)</i>
11/01/17	08/31/18	0.83	9.96	49.97	<b>60</b>
<p><i>Postdoctoral appointment term limit is 60 months. Requests for 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>.</i></p>					
<u>Additional Notes:</u>	N/A				

# New Postdoc Admin Info

Tammy Wilson  
Postdoctoral Services Manager



# New Postdoc Admin Info

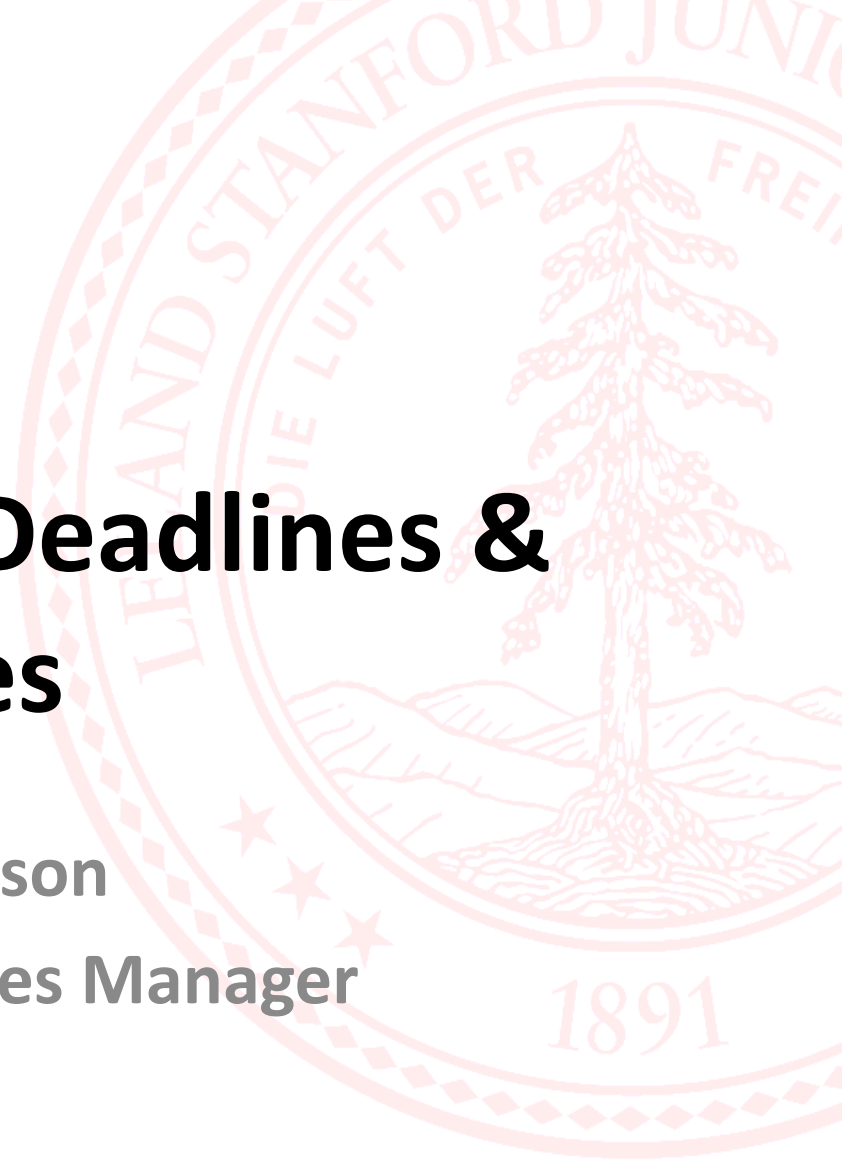
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- New staff or current staff moving into a Postdoc Administrative role:
  - For entry into various OPA systems, please submit HelpSU with this information:
    - Department Name
    - Staff Name
    - EmplID
    - SUNet ID
    - What role (e.g., admin or approver) authority

# Winter Closure Deadlines & Policies

Tammy Wilson

Postdoctoral Services Manager



# Winter Closure Web Forms Deadlines

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- **Postdoc web forms with a J-1 Visa:**
  - Initial Appointment and DS-2019: **December 8<sup>th</sup>**
  - Reappointment and DS-2019 extension: **December 11<sup>th</sup>**
  - Change in start date or early termination and amendment of existing DS-2019: **December 11<sup>th</sup>**

# Winter Closure Web Forms Deadlines

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- **Postdoc web forms with an H-1B visa:**
  - Initial Appointments or Reappointment:  
**November 9<sup>th</sup>**



# Winter Closure Web Forms Deadlines

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- **Postdoc web forms for US citizens and permanent residents:**
  - Complete and accurate postdoc web form transactions with a January 2018 start date submitted by **Monday, December 18<sup>th</sup>** will be approved and a PeopleSoft student record created/updated no later than the end of business on Friday, December 22<sup>nd</sup>.



# Winter Closure Policy

- University designated holidays are:
  - **Thanksgiving Holidays: Thursday, November 23 and Friday, November 24, 2017**
  - **Winter Closure Holidays: Monday, December 25, Tuesday, December 26<sup>th</sup>, and Monday, January 1, 2018**
- Additional 3 paid days off:
  - **Wednesday, December 27; Thursday, December 28; and Friday, December 29, 2017**
- Vacation/unpaid time off days:
  - **January 2-5<sup>th</sup>, 2018**
- *See the official OPA email of November 8<sup>th</sup> for additional terms and conditions*

# Multiple and Duplicate ID Numbers

Al Murray

Postdoctoral Services Manager



# Multiple & Duplicate IDs

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- Recent issues with multiple or duplicate IDs for postdocs:
  - Do NOT sponsor You MUST ensure there is no pre-existing ID
  - Must include an existing ID in the Comments or Notes to Approver text box to notify OPA

# Open Lab and In-Person Training

Al Murray

Postdoctoral Services Manager



# 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 – 11:00 am
- No computers in the training rooms, please bring a laptop
  - **1265 Welch Road, MSOB, x140**
    - December 1, 2017
  - **LKSC 205/206**
    - January – August, 2018

# 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>

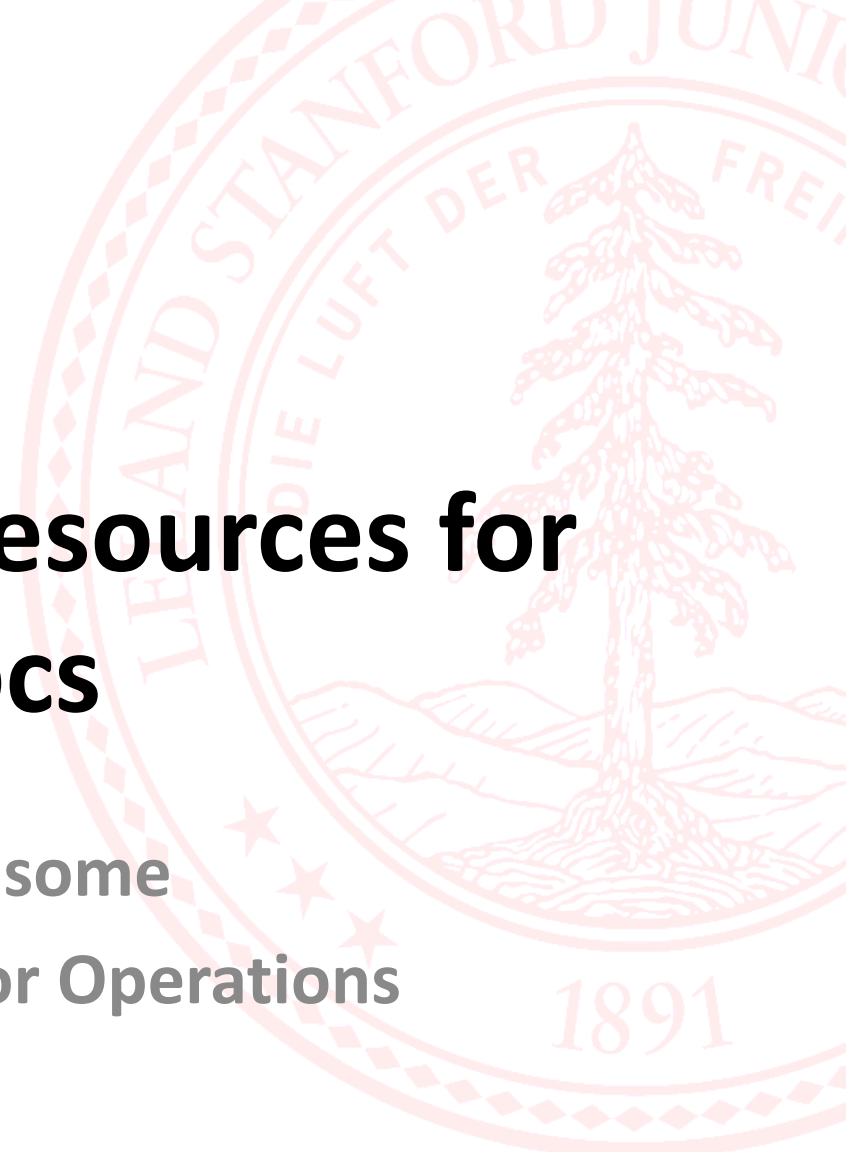
Other Resources:

<http://gfs.stanford.edu>

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

# Mental Health Resources for Postdocs

Annelies Ransome  
Associate Director for Operations



# Faculty Staff (and Postdocs)

## Help Center

- **Did you know there are *four* locations?**
  - Main Office, Kingscote Gardens, 419 Lagunita Drive
  - Stanford School of Medicine
  - SLAC
  - San Jose (Moorpark Ave., near Hwys 280 & 880)
- **Services:** Counseling, Facilitated Conversations, Workshops, and Discussion Groups.
- **Also:** Departmental Consultation and Training, and Departmental Retreat Facilitation.



# Postdoc Assistance Program - GuidanceResources

**Confidential Counseling – 24 hours per day, seven days per week**

This no-cost counseling service helps postdocs address stress, relationship and other personal issues. It is staffed by GuidanceConsultants - highly trained master's and doctoral level clinicians who will listen to your concerns and quickly refer you to in-person counseling and other resources for:

- Stress, anxiety and depression
- Relationship/marital conflicts
- Problems with children
- Job pressures
- Grief and loss
- Substance abuse

**Other GuidanceResources Services:** Financial Information & Resources, Legal Support and Resources, and WorkLife Solutions

# Open Forum

## Questions?

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

*Select "Other", then  
"Category: Central Office Issues," and  
"Request Type: Postdoctoral Affairs."*

For Postdoc Benefits: [postdocbenefits@stanford.edu](mailto:postdocbenefits@stanford.edu) (not HelpSU)

*Note: please do not email [postdocaffairs@stanford.edu](mailto:postdocaffairs@stanford.edu) for urgent matters.*