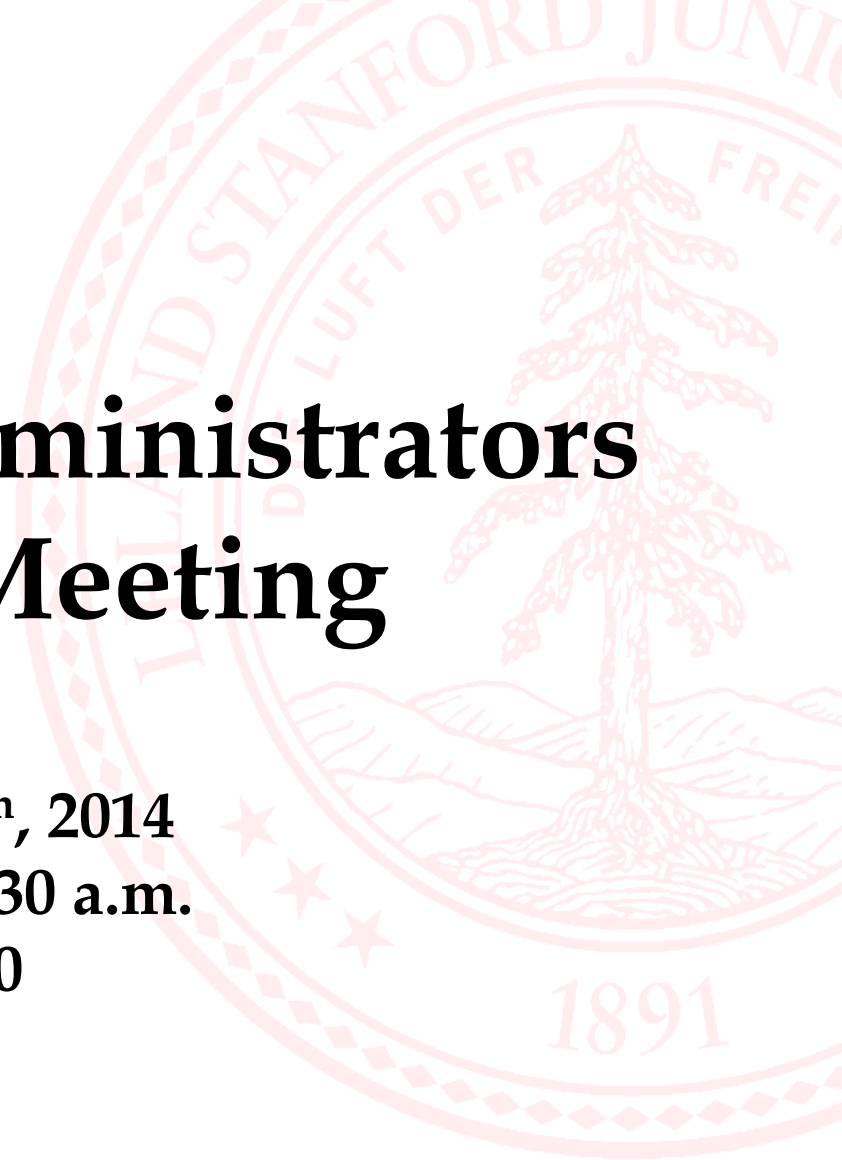


# Postdoctoral Administrators Quarterly Meeting

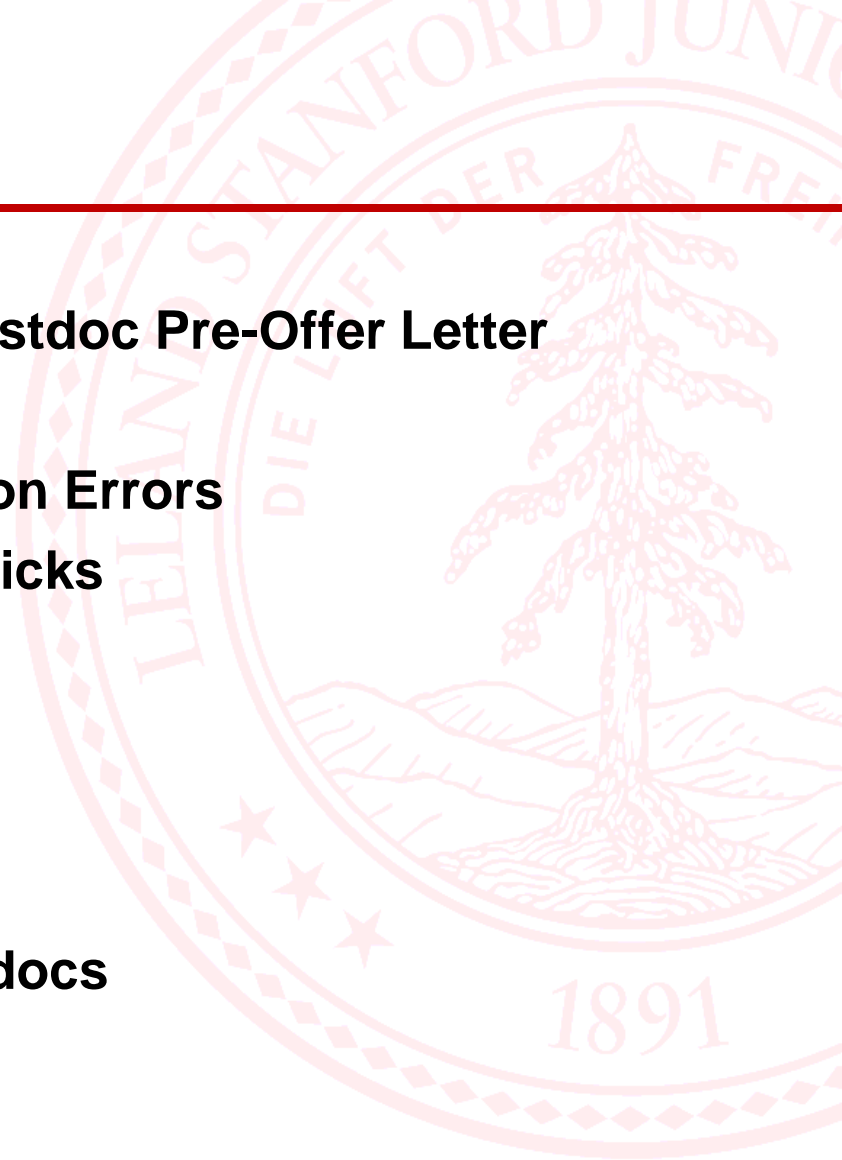
November 13<sup>th</sup>, 2014  
10:00 a.m. – 11:30 a.m.  
LKSC 120



# Agenda

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- ❖ **Template: Outside-Funded Postdoc Pre-Offer Letter**
- ❖ **Unapplied Aid BI Report**
- ❖ **Mid-Quarter Termination Tuition Errors**
- ❖ **Postdoc Web Forms Tips & Tricks**
- ❖ **Job Aid: Sixth Year Requests**
- ❖ **Updates from Sofie**
- ❖ **Winter Closure**
- ❖ **Open Labs and Trainings**
- ❖ **Upcoming Programs for Postdocs**
- ❖ **HelpSU Reminder**



The background features a large, faint watermark of the Stanford University seal. The seal is circular and contains a redwood tree in the center. The text "STANFORD JUNIOR" is visible at the top, "DIE LUFT DER FREI" is on the right, and "1891" is at the bottom. The seal is surrounded by a decorative border.

# **Template: Outside Funded Postdoc Pre-Offer**

**Shannon Monahan**

# Template: Outside Funded Pre-Offer

Dear XXXXXX,

We are excited by the possibility of having you as a postdoctoral scholar in our department at Stanford.

Thank you for sending along your CV and funding details. Before a formal invitation is made, I would like to confirm that your benefits and funding will cover the minimums required by the University Provost. I see that your funding will cover medical benefits. We would like to confirm that your coverage includes the Institutional Cost for the Stanford health insurance as listed on the chart of costs for 2014 here (middle column): [http://postdocs.stanford.edu/benefits/PDF%20Documents/2014\\_SUPD\\_Monthly\\_Health\\_Premium\\_Rates.pdf](http://postdocs.stanford.edu/benefits/PDF%20Documents/2014_SUPD_Monthly_Health_Premium_Rates.pdf). Note that there may be additional out-of-pocket costs if you elect dependent coverage (last column under Your Cost).

A note about insurance coverage: Stanford requires that all postdocs and their dependents are covered by health insurance that meets the Affordable Care Act standards. In most cases, that means using the Stanford SHCA plan. Note that we have not seen a travel insurance policy that meets ACA standards. If you have questions about another plan, we recommend that, BEFORE YOU PURCHASE, you send a copy of the Explanation of Benefits for your plan to [postdocbenefits@stanford.edu](mailto:postdocbenefits@stanford.edu) to ensure that it meets standards.

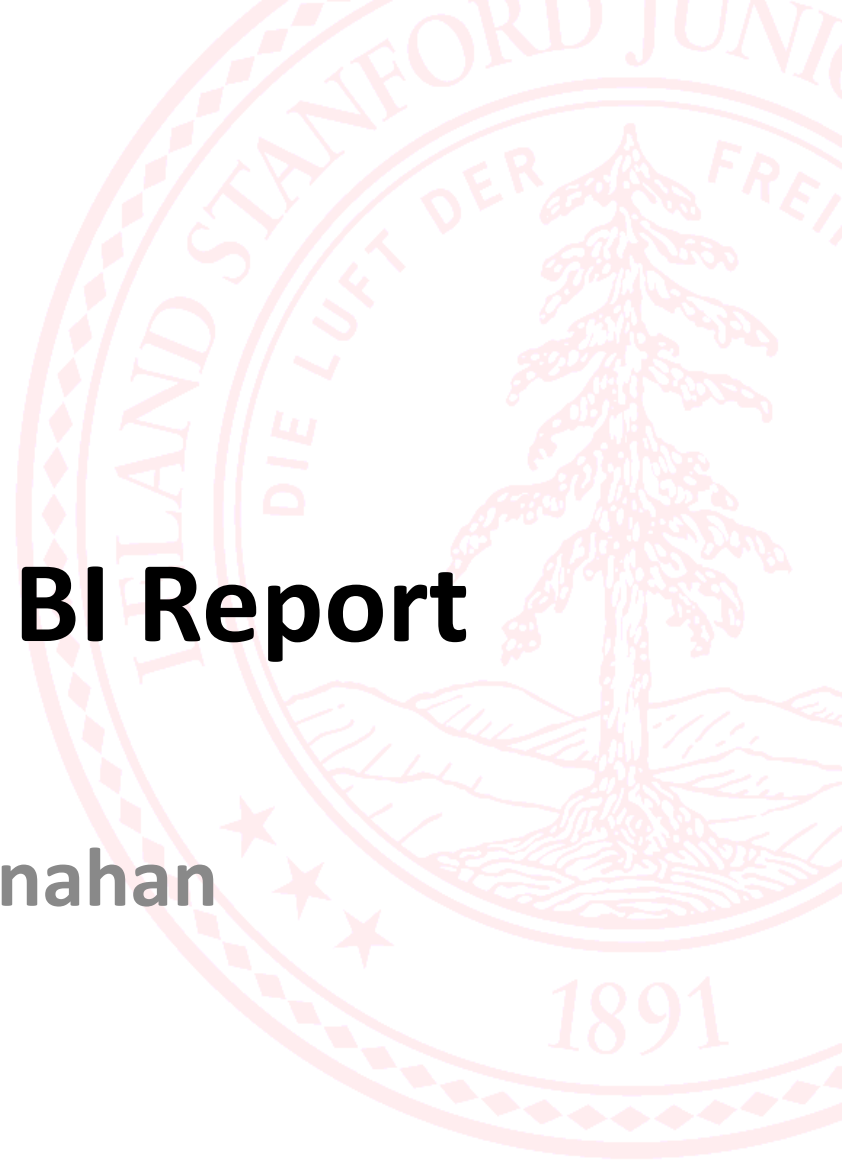
In order for us to extend an offer, the following funding should be included. The funding required will increase if adding dependents to the insurance plan.

Coverage	Yearly insurance	Minimum Salary incl. Oct 1 incr (approx)	Total Required Funding
Postdoc Only	\$7,628.28	\$45,500.00	<b>\$53,128.28</b>
PD + Spouse	\$12,837.24	\$45,500.00	<b>\$58,337.24</b>
PD + Children	\$11,260.92	\$45,500.00	<b>\$56,760.92</b>
PD + Family	\$18,252.00	\$45,500.00	<b>\$63,752.00</b>

Please let me know if you have any questions regarding this information.

# Unapplied Aid BI Report

Shannon Monahan



# Unapplied Aid BI Report

- To run:
  - bi.stanford.edu
  - **\*\*Process by\*\***: **Academic Plan**
  - Academic Plan: **<select for your dept>**
    - Be sure to include both (PD) and (MF) when necessary
  - Click on the *Plain GFS Unapplied Aid* tab
  - Click on the Apply button
- Will produce a pdf of a list of your postdocs, terms, and unapplied aid amounts

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 "LELAND STANFORD JUNIOR" at the top, "DIE LUFT DER FREI" on the right, and "1891" at the bottom. The seal is rendered in a light red color.

# **Postdoc Mid-Quarter Termination GFS Tuition/TAL Override**

**Nancy Child, FAO**

# Mid-Quarter Termination GFS Override

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 'LELAND STANFORD JUNIOR' at the top and '1891' at the bottom. The seal is partially obscured by the text and a red horizontal line.

## Issue:

- GFS Tuition/TAL does not disburse to the PD's account
- PD's status is Discontinued/Withdrawn

## Why did this happen?

- PD is Discontinued mid-quarter before the aid has disbursed
- Aid changes after PD is Discontinued and will not disburse



# Mid-Quarter Termination GFS Override

The background of the slide features a large, faint watermark of the Stanford University seal. The seal is circular and contains a tree in the center, with the text 'LELAND STANFORD JUNIOR' at the top and 'DIE LUFT' on the left. The year '1891' is visible at the bottom of the seal.

## What do you do?

- Disbursement Aid Seq Override
- **Note:** Need Authority to be able do this – setup in Authority Manager

## Resources:

- BI Report, GFS Aid Disbursement Status (PS\_GFS006)
- In GFS, check Disbursement of aid line
- In GFS, check Disbursement Messages
- Check Student's bill
- Check Student's Program/Plan

# Mid-Quarter Termination GFS Override

Note the Termination Date

FLSHP Spend | FLSHP Tuition | **Assist Salary** | Assist TAL | Work Panel

Aid Year: 2015    Institution: STANF    Mail Code: 4300     All Calendar

TAL Category	Total Amt	Autumn PD	Winter PD	Spring PD	Summer PD
All Assist Salary	1666.91	1666.91			

**Enter Assistantship Salary**

Aid Seq	Ident	Pay Org	Assist Code	Dist. Plan	Hours/Week	Min. Pay Period Amt	Pay Period Amt	Start Date	End Date	Termination Date	Assist Total	Detail	Calc TAL	Info only	Status	Description	Approval Status
AST001		ZZUJ	RAF	NM-Payroll	40.00		2292.00	10/01/2014	12/31/2014	10/10/2014	1666.91	Detail	Calc TAL	<input type="checkbox"/>	C	Complete	Approved

FLSHP Spend | FLSHP Tuition | Assist Salary | Assist TAL | Work Panel

FLSHP Spend | FLSHP Tuition | Assist Salary | **Assist TAL** | Work Panel

Aid Year: 2015    Institution: STANF

TAL Category	Total Amt	Autumn PD	Winter PD	Spring PD	Summer PD
All Awarded TAL	125.00	125.00			

**Assistantship TAL**

Select	Aid Seq	Ident	Pay Org	Job #	Assist Hrs	School Cd	Dist. Plan	TAL Calc Total	Awarded Total	Detail	Status	Description	Approval Status
<input type="checkbox"/>	TAL001	Norskov	ZZUJ	AST001	40.00	FAO-OU	NM-Payroll	125.00	125.00	Detail	C	Complete	Approved

FLSHP Spend | FLSHP Tuition | Assist Salary | Assist TAL | Work Panel

# Mid-Quarter Termination GFS Override

## Disbursement Error

### Tal Detail

Aid Year: 2015	Aid Seq: TAL001	Amt Total	Autumn	Winter	Spring	Summer
Norskov	Job # AST001	125.00	125.00			
		Line Totals	125.00			

**Term Distribution** Find | View All First 1 of 1 Last

Term: 1152 14-15 Aut  
TAL Category: pD

**Overrides**

<input type="checkbox"/> Allocation	Calculated Term TAL	125.00	Override Rsn:
<input type="checkbox"/> Amount	Awarded Term TAL	Rsn: 125.00	
	Amt	descr:	

**Item Type Charging Detail**

Seq No	Disb Stat	DateTime Disbursed
1	Error	11/10/2014 5:00:19PM

OK Cancel

# Mid-Quarter Termination GFS Override

STF Grad Financial > STF Graduate Financial Support > Inquire > Disbursement Messages

The screenshot displays a web interface for "Disbursement Messages". At the top, it shows "Aid Year: 2015" and "Institution: STANF". Below this, there are navigation controls including "Find", "View All", "First", "1 of 1", and "Last". The main content area shows a message for "Term: 1152 2014-2015 Autumn". The message details are: "Aid Seq: TAL001", "No: 1", and a timestamp of "11/10/14 5:00PM". The message text reads: "Message: Student has withdrawn". At the bottom of the interface, there are three buttons: "Save", "Return to Search", and "Notify".



# Mid-Quarter Termination GFS Override

## Student Financials > Charges and Payments > STF Account Summary

### Account Detail for Term

2014-2015 Autumn

As of Date: 11/11/2014

Last Activity Date: 07/28/2014

Term Balance: 125.00 USD

#### Charges

Date Posted	Item Description	Amount	Currency Code
07/28/2014	Graduate Tuition	125.00	USD

Total Charges: 125.00 USD

#### Payments

Date Posted	Item Description	Amount	Currency Code
		0.00	USD

Total Payments: 0.00 USD

Term Balance: 125.00 USD

#### Anticipated Aid

Date	Item Description	Amount	Currency Code
	CFO RAVTA Tuition Allowance	-125.00	USD

Anticipated Aid Total: -125.00 USD

[Return to Account Summary](#) [Return to Search](#)



# Mid-Quarter Termination GFS Override

Records and Enrollment > Career and Program Information > Student Program Plan

The screenshot displays the 'Student Program Plan' interface in the GFS system. At the top, there are navigation tabs: 'Student Program' (selected), 'Student Plan', 'Student Sub-Plan', 'Student Attributes', and 'Student Degrees'. Below the tabs, the 'Academic Career' is 'Graduate' and the 'Career Requirement Term' is 'Student Career Nbr: 0'. The main content area shows a table of program details:

Status:	Discontinued	
Effective Date:	10/11/2014	
Program Action:	DISC	Discontinuation
Action Reason:	PACC	Accepted another position
Academic Institution:	STANF Stanford University	
Academic Program:	CHEME	Chemical Engineering
Admit Term:	1132	12-13 Aut
Requirement Term:	1132	12-13 Aut
Expected Grad Term:	1152	14-15 Aut
Last Updated On:	10/10/2014 3:03:20PM	
By:	ALISTAIR	

Additional details on the right side include 'Effective Sequence: 1', 'Action Date: 10/10/2014', and 'Joint Prog Appr: '. An 'Admissions' section shows 'From Application' with 'Application Nbr: 0' and 'Application Program Nbr: 0'. The 'Campus' is 'STANF SU Main' and the 'Academic Load' is 'Full-Time'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'. A breadcrumb trail at the very bottom reads: 'Student Program | Student Plan | Student Sub-Plan | Student Attributes | Student Degrees'.

# Mid-Quarter Termination GFS Override

STF Grad Financial Support > STF Graduate Financial Support >  
Use > Disbursement Aid Seq Override

**Note:** Need Authority to be able do this – setup in Authority Manager

Add the Term, 1152, and Aid Line, TAL001

## Disbursement Override

Aid Year: 2015    Institution: STANF

Find | View All | First | 1 of 1 | Last

Term:

Personalize | Find | View All | | First | 1 of 1 | Last

Aid Seq Number	Operid
<input type="text"/>	<input type="text"/>

Save    Return to Search    Notify



# Postdoc Web Forms Tips & Tricks

Tammy Wilson





# Postdoc Web Forms Tips & Tricks

- Retroactive Appointment Start Dates
  - No more than 30 days past
  - If a one or more pay cycles have been missed:
    - Immediately after appointment data is loaded, process an off-cycle check for missed payments
    - [http://web.stanford.edu/group/fms/fingate/staff/payadmin/quick\\_steps/request\\_offcycle\\_stipend.html](http://web.stanford.edu/group/fms/fingate/staff/payadmin/quick_steps/request_offcycle_stipend.html)

# Postdoc Web Forms Tips & Tricks

- Termination Web Forms
  - Revised = end date is changed, a new termination web form will be submitted *immediately*
  - Reversed = appointment is extended, a new termination web form will be submitted *in the future*
  - Email to AI (SOM) or Tammy (university) the reason for the revised/reversed termination
    - Cc: Shannon Monahan and Postdoc Benefits
    - OPA will respond when a new termination or change request can be submitted
  - Note in Comments box of new termination web form: “Revised termination”

# Postdoc Web Forms Reminders

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' at the top and 'DIE LUFT BRINGT FREIHEIT' at the bottom. The year '1891' is also present at the bottom of the seal.

- Recommendation Web Form
  - What does a “grey” approval button mean?
    - Postdoc has not accepted online offer letter
  - Don’t forget to “verify” (second approval)
    - Pending recommendation forms in your workflow
    - Upload any missing documents prior to verification
      - No “save” button on upload – view the document list

# Job Aid: Sixth Year Requests

Tammy Wilson



# Job Aid: Sixth Year Requests

## (Summary Version)

Read University Policy 2F and 2G for approvals grantable by OPA using exceptions to policy:  
<http://doresearch.stanford.edu/policies/research-policy-handbook/non-faculty-research-appointments/postdoctoral-scholars>

If not covered by an exception, prepare the following for Faculty Subcommittee Review:

- Create a new Change Transaction Web Form
- Gather required documents for committee review :
  - a) Mentoring Plan – detailing progress, training plan, and job search plan
  - b) Letter from PI on department letterhead - detailing progress to date, benefit of additional training, and exit plan.
  - c) Updated CV for postdoc.
  - d) Research Experience Calculator (available on [postdocs.stanford.edu](http://postdocs.stanford.edu))
- Submit documents as a single PDF via email to the postdoctoral manager for your department:
  - School of Medicine [alistair@stanford.edu](mailto:alistair@stanford.edu)
  - University [tjwilson@stanford.edu](mailto:tjwilson@stanford.edu)
- Submit PD Web Forms request and visa extension (if International)
- **JOB AID will be available on [postdocs.stanford.edu](http://postdocs.stanford.edu) in the near future with full details!**

# Updates From Sofie

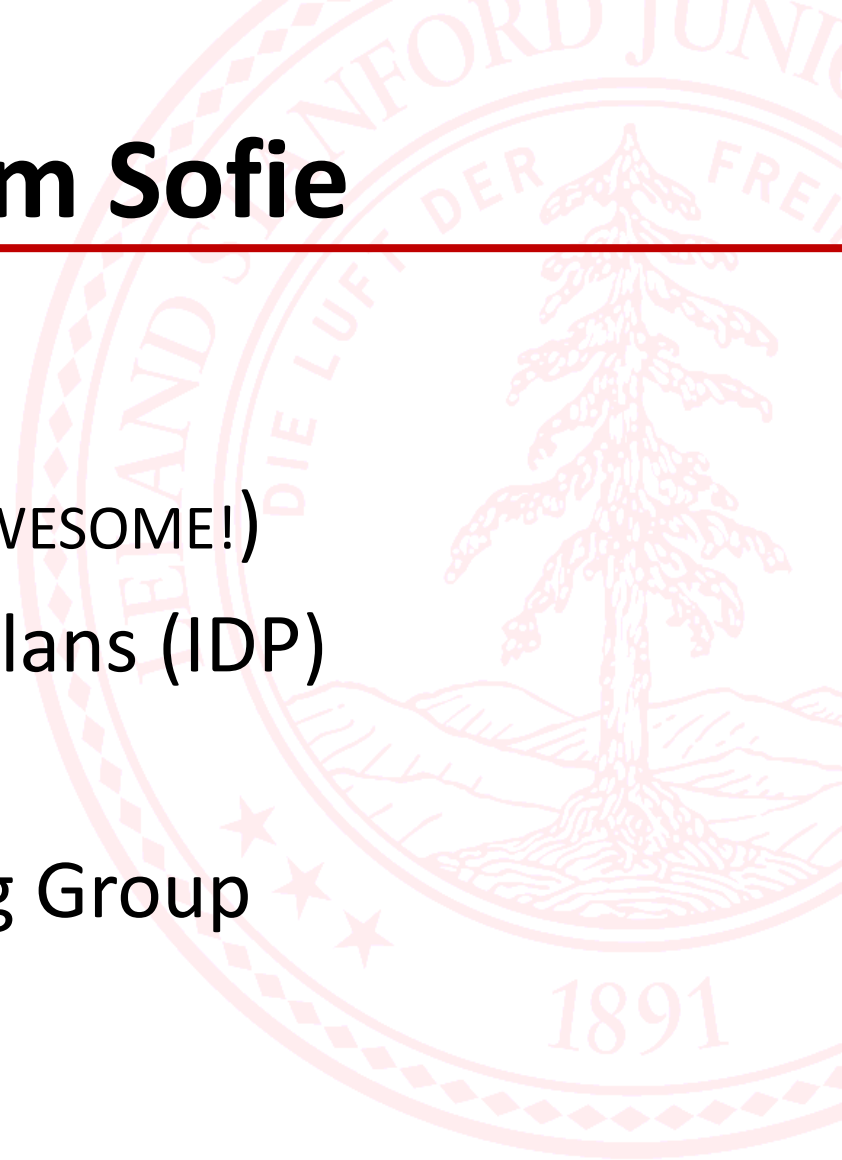
Sofie Kleppner



# Updates from Sofie

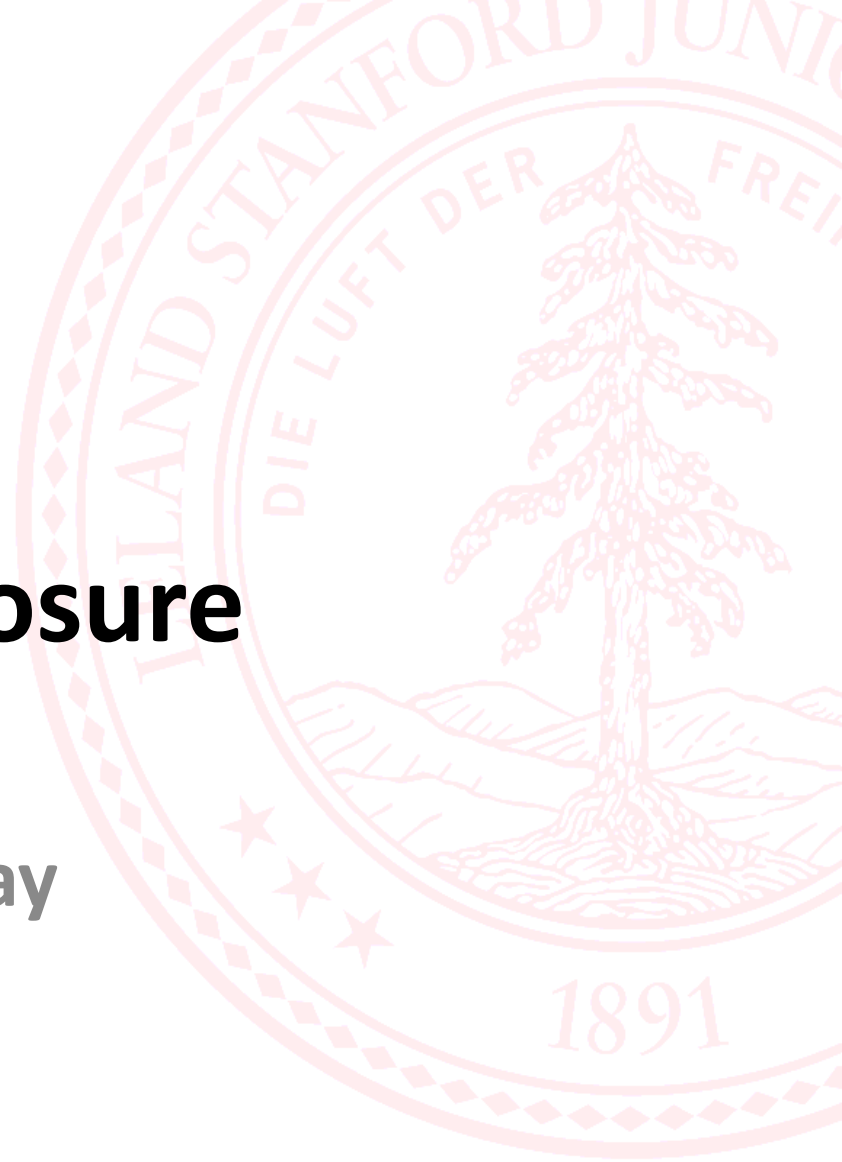
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- NPA Survey (Stanford is AWESOME!)
- Individual Development Plans (IDP)
- Postdoc Go Passes
- Postdoc Admin Mentoring Group



# Winter Closure

Al Murray





# Winter Closure Deadlines

FOR TRANSACTIONS THAT MUST BE PROCESSED BEFORE WINTER CLOSURE

- Initial Appointments (Recommendation Form) and DS-2019 with a January start date:
  - **December 4<sup>th</sup>** in order to meet Bechtel's deadline of December 11<sup>th</sup>
- Appointment Extension (Change Form) and Extension of DS-2019:
  - **December 9<sup>th</sup>** in order to meet Bechtel's deadline of December 16<sup>th</sup>
- Changes in start date\* or early termination and the accompanying amendment of existing DS-2019:
  - **December 9<sup>th</sup>** in order to meet Bechtel's deadline of December 16<sup>th</sup>
  - *\*If there is a change in start date, process a Change Transaction to indicate new start date after Recommendation Form has been approved and record loaded to PeopleSoft.*
- Initial Appointments (Recommendation Form) or Extension of Appointment (Change Form) for holders of H-1B visas\*\*:
  - **November 14<sup>th</sup>** in order to meet Bechtel's deadline of November 17<sup>th</sup>
  - *\*\*This applies to petitions that do not require Review Board decision. Please contact Tammy Wilson, [tjwilson@stanford.edu](mailto:tjwilson@stanford.edu), if you have questions*

# Winter Closure Deadlines

FOR TRANSACTIONS THAT MUST BE PROCESSED BEFORE WINTER CLOSURE

- US citizens or permanent residents only:
  - All transactions submitted by **Wednesday, December 17<sup>th</sup>** will be approved and a PeopleSoft student record created/updated by the end of business on Friday, December 19<sup>th</sup>
- OPA reviews and approves appointment actions (new appointments, terminations and changes) within five business days from receipt, provided that the submissions are accurate and complete.
- International Scholars require additional processing steps of the related visa documents in two offices, so additional time has been added to the deadlines listed above to allow for the full review and approval process to take place.

# Winter Closure Policy

- Postdoctoral scholars typically observe the official University designated holidays on the dates below or at a time agreeable with their faculty/PI's depending on the research group/lab schedule.
  - Postdoctoral scholars may not cover the designated holidays with their accrued days of paid sick or vacation leave.
  - With prior faculty/PI approval, Postdoctoral scholars may accomplish their assigned work remotely, without taking vacation days during those days.
- Designated holidays are:
  - **Thanksgiving holidays:**
    - Thursday, November 27, and Friday, November 28, 2014
  - **Winter closure designated holidays:**

• Monday, December 22, 2014	Paid day off if lab is shutdown
• Tuesday, December 23, 2014	Paid day off if lab is shutdown
• Wednesday, December 24, 2014	University Holiday
• Thursday, December 25, 2014	University Holiday
• Friday, December 26, 2014	Paid day off if lab is shutdown
• Monday, December 29, 2014	Vacation/PTO/Unpaid time off if lab is shutdown
• Tuesday, December 30, 2014	Vacation/PTO/Unpaid time off if lab is shutdown
• Wednesday, December 31, 2014	Vacation/PTO/Unpaid time off if lab is shutdown
• Thursday, January 1, 2015	University Holiday
• Friday, January 2, 2015	Vacation/PTO/Unpaid time off if lab is shutdown

# Drop-In Open Labs

Al Murray



# Drop-In Open Labs

- Open Labs for Help with PD Web Forms (with OPA staff member):
  - First Friday of every month, 9:00 am – Noon
  - [Birch Modular, Lab B \(215 Panama St\)](#)
  - *Web Forms trainings are now scheduled on an as needed basis during Open Labs*
- PeopleSoft Open Labs for help with GFS, other PeopleSoft systems and STARS:
  - Every Friday, 9:00 am – Noon
  - [Birch Modular, Lab B \(215 Panama St\)](#)

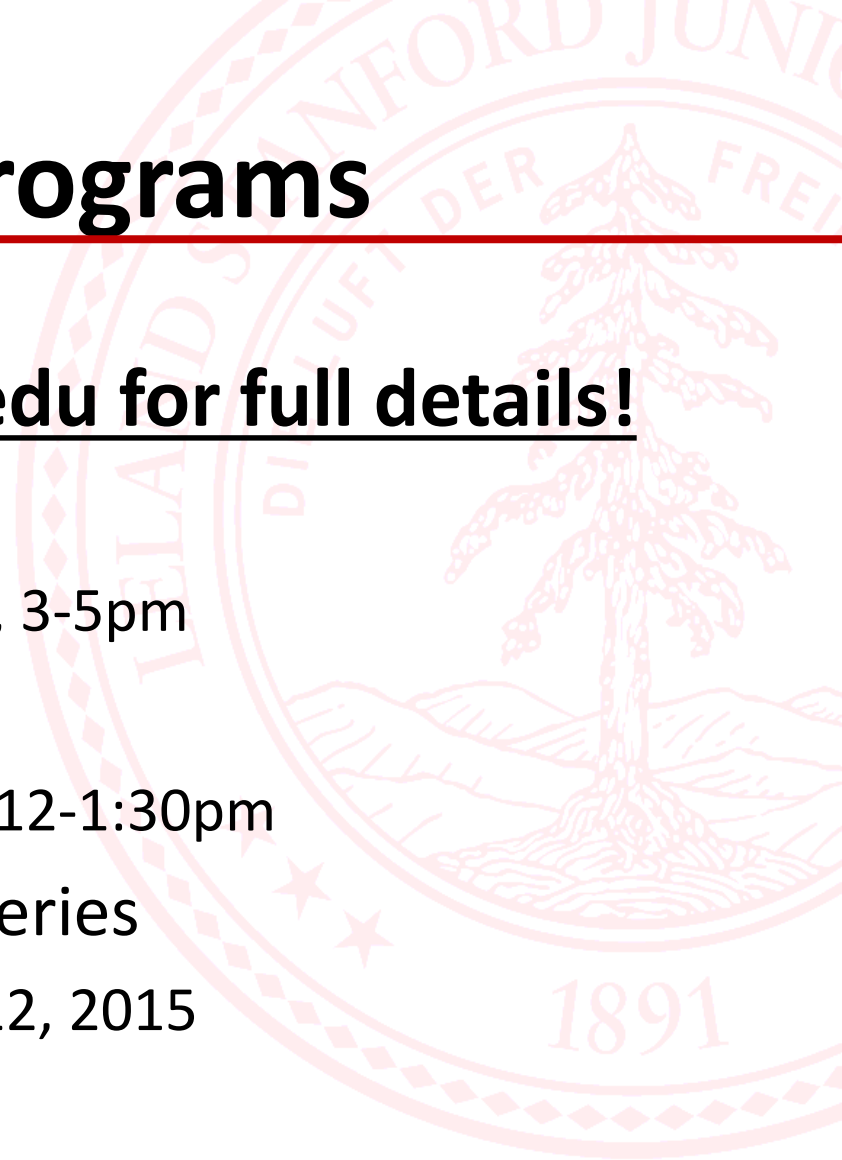
# Programs

Annelies Ransome



# Upcoming Programs

- **See [postdocs.stanford.edu](http://postdocs.stanford.edu) for full details!**
  - Art of Asking Questions
    - Next: Thursday, 11/13/14, 3-5pm
  - Academic Chats
    - Next: Tuesday, 11/18/14, 12-1:30pm
  - Scientific Management Series
    - Next: January 8 – March 12, 2015
  - Spring Postdoc Mixer
    - Next: Thursday, 04/09/15, 4-6pm



# 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")*