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/mailinglists/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
  • Benelogic Training
  • GFS Salary Policy and Entry
  • J-1 Scholar and H-1B Visa
  • Clinical Appointments

https://postdocs.stanford.edu/postdoctoral-administrators
• 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

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

<table>
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<tr>
<th>Coverage</th>
<th>Coverage Annual insurance* (paid in monthly installments)</th>
<th>Minimum Annual Salary**</th>
<th>Minimum Required Total Funding</th>
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<td>Postdoc Only</td>
<td>$10,753 +</td>
<td>$68,238 +</td>
<td>$78,991 +</td>
</tr>
<tr>
<td>PD + Spouse</td>
<td>$21,540 +</td>
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<td>PD + Family</td>
<td>$29,920 +</td>
<td>$68,238 +</td>
<td>$98,158 +</td>
</tr>
</tbody>
</table>

* 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)

https://postdocs.stanford.edu/postdoctoral-administrators/appoint-postdoctoral-scholars
• 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
• 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
• 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
**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
Robin’s Letter of Completion

University of Ockfold
Registrar’s Office

June 15, 2019

To Whom It May Concern:

Re: Robin Hood

The Academic Board of the University of Ockfold 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 Ockfold
"Robbing the Rich to Feed the Poor"
Supervisor: Prof. F. Tuck

Sep 2012 – Jun 2014
Master of Science, University of Ockford
"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 Ockfold
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
• **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
**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

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.**

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

https://axess.sahr.stanford.edu/
• Skip the search fields
• Click “Add” to initiate a new Invite
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
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
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
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
• 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
NEW APPOINTMENT

Postdoc Candidate’s View of Invite and Data Form
CANDIDATE’S VIEW OF THE INVITE EMAIL

From: workflow@psrpcp0d1.stanford.edu <workflow@psrpcp0d1.stanford.edu>
Sent: Monday, February 25, 2019 8:48 PM
To: Robinhood749Q@gmail.com
Subject: Important Notification to Start Your Stanford Postdoctoral Appointment Process.

Dear Robin Hood,

Tommy Wilson at INSTINT.

UST 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 Tommy 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:
   - Specific degrees earned, e.g., PhD, MD, MBBS, etc.
   - 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:
   - all identification pages of your passport and any dependents (spouse/child) who will join you at Stanford.
   - 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 letter for each source of funding on funding agency’s letterhead in English.
   - Exact dates for when the funding is to be used.
   - The total award amount, what exactly the funds cover, and in what amounts (e.g., stipend, insurance, travel, etc.)
   - 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
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 (SU/NID) and will have access to the University network and online services via the Axess 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 MUST USE SAME EMAIL ADDRESS WHERE INVITE WAS SENT
PROCESS:
CANDIDATE LOGS IN WITH CREATED USER ID AND PASSWORD
PROCESS:
CANDIDATE CLICKS POSTDOCTORAL SCHOLAR DATA FORM LINK
PROCESS:
CANDIDATE MUST USE SAME EMAIL ADDRESS HERE AS PREVIOUS

Postdoctoral Scholar Data Form

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.
You may opt to skip this page.
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
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
## 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.

<table>
<thead>
<tr>
<th>Institution ID</th>
<th>Country</th>
<th>Start Date</th>
<th>End Date</th>
<th>Degree</th>
<th>Degree Date</th>
<th>Field Of Study</th>
<th>Phd Advisor Name</th>
<th>Phd Dissertation Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Oxford</td>
<td>GBR</td>
<td>15-SEP-11</td>
<td>15-JUN-16</td>
<td>PhD</td>
<td>15-JUN-16</td>
<td>Food Security</td>
<td>Fria Tuck</td>
<td>Robbing the Rich to Feed the Poor</td>
</tr>
</tbody>
</table>

Previous | Home | Save As Draft

Next
**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](image)

<table>
<thead>
<tr>
<th>Position/Title</th>
<th>Company/Institution</th>
<th>State</th>
<th>City</th>
<th>Country</th>
<th>Start Date</th>
<th>End Date</th>
<th>Work Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postdoc</td>
<td>Dickinson University</td>
<td>Greater London</td>
<td>Oxford</td>
<td>GBR</td>
<td>01-JUL-18</td>
<td>30-JUL-18</td>
<td>Research – postdoctoral training</td>
</tr>
<tr>
<td>Postdoc</td>
<td>Princeton University</td>
<td>NJ</td>
<td>Princeton</td>
<td>USA</td>
<td>01-JUL-18</td>
<td>30-JUL-18</td>
<td>Research – postdoctoral training</td>
</tr>
</tbody>
</table>

[1] [Next]
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 U.S. 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, I-20, 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 from 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 what amounts (e.g., stipend, insurance, travel, etc.)
   d. Whether or not the funds are received whether it is transferred in foreign currency or USD.
   e. 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., lastname_diploma_graduation_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**

- **Choose File**
  - No file chosen

**Uploaded Documents**

[View uploaded documents...]

[Next]
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

**PROCESS:**

CANDIDATE CAN SEE UPLOADED DOCUMENT LIST BUT CANNOT DELETE
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, cooperate in such an investigation, to execute any consent forms required in connection with appointment termination could result from investigation results. I certify that statements misleading or omitted information could result in appointment termination in cases where

☐ I Agree
PROCESS:
CANDIDATE’S DATA FORM SUBMISSION CONFIRMATION MESSAGE

Stanford University

Postdoctoral Scholar Appointment Process

- Postdoctoral Scholar Data Form

Transaction ID: 017315669
Transaction Status: Submitted for Review
Request Help with Secure Portal Postdoctoral Scholar

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)
- Stanford’s Office of Postdoctoral Affairs (for policies, fellowships, and educational programs)
- Stanford Postdoc Benefits (for health insurance costs and information)
- Stanford’s Bechtel International Center (for visa policies and international tax treaties)
PROCESS:
ADMIN’S EMAIL NOTICES OF DATA FORM SUBMISSION

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

You must now carefully check all the 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.

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

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

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 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/
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#
PROCESS: REVIEW THE DATA FORM

• Open a new browser tab and open Nolij using this URL: https://imaging.Stanford.edu/NolijWeb/
• 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
PROCESS: CLICK ON A DOCUMENT TO OPEN IT
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
PROCESS:
REVIEW PERSONAL DETAILS FOR INTERNATIONAL SCHOLARS

• Real World Training Scenario:
• Name Data – Compare to Passport
  • MUST MATCH passport name data as shown in the machine-readable text on the bottom of the bio/demo passport page
  • Helpful Hint: Special characters (accent (é), umlaut (ä), tilde (ñ), etc.) in the name data affects the “Search by name function” in postdoc web forms
PROCESS:

REVIEW PERSONAL DETAILS FOR INTERNATIONAL SCHOLARS

- **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)
**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

Personal Details:

- Last Name: Hood
- *First Name: Robin
- *Date of Birth: 07/04/1990
- *City: Stanford, CA
- *Country: United States
- *State: California
- *Country of Citizenship: GBR United Kingdom
- *Sex: Female
- *Marital Status: Single
- *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

Address 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

Personal Addresses

*Email address:  mnikhoo96@gmail.com

Current Mailing Address

*Address Line 1:  1234 Forest Glen Lane
   Address Line 2:  
   *City:  Sherwood Forest
   *State/Province:  Greater London
   *Country:  GBR United Kingdom
   *Zip Code:  SE10 6JG
   *Phone:  1234555-1212
   Valid Through Date:  

Permanent/Home Mailing Address

*Address Line 1:  1234 Forest Glen Lane
   Address Line 2:  
   *City:  Sherwood Forest
   *State/Province:  Greater London
   *Country:  GBR United Kingdom
   *Zip Code:  SE10 6JG
   *Phone:  1234555-1212
   Valid Through Date:  
PROCESS: REVIEW OUTSIDE FUNDING DETAILS

- If Candidate selects “Yes”:
  - A Notice of Award or Funding Letter must be uploaded
• Review for missing data or incorrect degree conferral date
  • compare to conferral date on degree and CV
• Click “View All” if multiple institutions listed
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
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**

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
Admin may enter approval comments to document important information, if needed

- e.g., proof of degree will be provided when available
• 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
NEW APPOINTMENT:
Postdoc Admin Entry: Create a Recommendation Web Form
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/
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
**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.

---

**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**

<table>
<thead>
<tr>
<th>Select PostDoc Data Form:</th>
<th>01731669</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this request for Department Transfer:</td>
<td>No</td>
</tr>
</tbody>
</table>

**Supporting Documents**

- **Comparative Display of Biographic Data**
- **Offer Letter**
- **Complete Information Sheet**
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

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!
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

---

**Click Steps: Transaction Details Box**

**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

<table>
<thead>
<tr>
<th>Transaction Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select PostDoc Data Form:</td>
</tr>
<tr>
<td>*Postdoctoral Request Type:</td>
</tr>
<tr>
<td>Is this request for Department Transfer:</td>
</tr>
<tr>
<td>Comparative Display of Biographic Data</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointee Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name: Hood</td>
</tr>
<tr>
<td>First Name: Robin</td>
</tr>
<tr>
<td>Middle Name:</td>
</tr>
<tr>
<td>Date of Birth: 07/04/1960</td>
</tr>
</tbody>
</table>
• 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)
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”
• “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)
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
“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
### Appointee Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Hood</td>
</tr>
<tr>
<td>First Name</td>
<td>Robin</td>
</tr>
<tr>
<td>Middle Name</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td>07/04/1990</td>
</tr>
</tbody>
</table>

### Department Applied

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Dept ID</em></td>
<td>INST111LSI Institute for Intl Studies</td>
</tr>
<tr>
<td><em>Faculty Sponsor ID</em></td>
<td>05144732 David Lobell</td>
</tr>
<tr>
<td><em>Research Mentor ID</em></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Email Addr</td>
<td><a href="mailto:pscs-dev-emails@stanford.edu">pscs-dev-emails@stanford.edu</a></td>
</tr>
</tbody>
</table>

### Education Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution ID</td>
<td>05000804 University of Oxford</td>
</tr>
<tr>
<td>City</td>
<td>Oxford</td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Degree</td>
<td>PHD Doctor of Philosophy</td>
</tr>
<tr>
<td>Start Date</td>
<td>06/15/2011</td>
</tr>
<tr>
<td>Field of Study</td>
<td>FOOD SECURITY</td>
</tr>
<tr>
<td>Country</td>
<td>GBR United Kingdom</td>
</tr>
<tr>
<td>Degree Date</td>
<td>06/15/2016</td>
</tr>
<tr>
<td>End Date</td>
<td>06/15/2016</td>
</tr>
</tbody>
</table>

### Academic Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Academic Career</em></td>
<td></td>
</tr>
<tr>
<td><em>Academic Plan</em></td>
<td></td>
</tr>
<tr>
<td><em>Academic Program</em></td>
<td></td>
</tr>
<tr>
<td>Academic Sub-Plan</td>
<td></td>
</tr>
<tr>
<td>Other Stanford</td>
<td></td>
</tr>
<tr>
<td>Associations</td>
<td></td>
</tr>
</tbody>
</table>
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”
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, 2023, and end on August 31, 2024. 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
· “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
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
• “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

**Fix number of months in this editable field!**
If Candidate Has NO Previous Research Experience

• Be sure the “Research Experience noted by department” editable field shows “zero”
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.**

Fix Data Here, if needed!
• 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
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
• 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.
**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:** [ ]
- **Appointment End Date:** [ ]
- **Offer Letter 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:

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](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](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.
**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](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

<table>
<thead>
<tr>
<th>Description</th>
<th>Annual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prof Lobell’s Research Grant</td>
<td>$68,238</td>
</tr>
</tbody>
</table>

New Stipend / Fellowship support paid through Stanford University - Description

<table>
<thead>
<tr>
<th>Description</th>
<th>Annual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

New Outside support with direct payment to fellow - Description

<table>
<thead>
<tr>
<th>Description</th>
<th>Annual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Required Salary:** $68,238  **Total Annual Amount:** $68,238
• 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
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
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
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
**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](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:**

**New Stipend / Fellowship support paid through Stanford University - Description**

- **Annual Amount:**

**New Outside support with direct payment to fellow - Description**

- **Annual Amount:**

**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:** 650/388-1283
- **Email Addr:** pscs-dev-emails@stanford.edu

---

**Supporting Documents**
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
PROCESS:
ROLE #3 APPROVAL TRIGGERS EMAILS

Approval email to Faculty Sponsor

From: workflow@psgccst30.stanford.edu <workflow@psgccst30.stanford.edu>
Sent: Friday, March 6, 2020 10:14 AM
To: pwbwebtesting@stanford.edu
Subject: Test message: Recommendation Sheet with transaction ID: 01829752

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

Dear Professor [Name],

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 [Insert Name]. Upon approval by the department, your prospective position will receive an email notification to document your approval and University policy regarding postdoctoral scholars, and it will include the information required for this appointment as follows:

During the appointment, Robin Hood will be involved in the exciting work of [Insert Work Area] and the environment. The initial appointment will begin on [Insert Start Date] and end on [Insert End Date]. The initial support for the initial year of training will be [Insert Amount] plus certain medical, dental, vision, and insurance coverage through Stanford's Postdoctoral Fellow Program. This appointment may be renewed, prior to the anticipated end date, due to receipt of funding. Changes in appointment are subject to annual performance reviews. Effective on October 1st each year, the funding support may change as the university's fiscal and contractual obligations change. During the course of their appointment, they will have access to benefits such as research, professional development, and opportunities for advancement. The professor's role is primarily focused on managing the professor's time and responsibilities associated with this appointment.

Postdoctoral Scholars are expected to attend mandatory Postdoctoral Fellow orientation sessions that occur at the start of each appointment. Stanford provides a range of benefits and other benefits to all postdoctoral scholars. In addition to those health care coverage through Stanford's [Insert Health Plan], the professor must enroll within the first 30 days of the appointment start date. Please refer to the Stanford Health Care Handbook for more information. For any questions or concerns about your offer of appointment, please contact [Insert Contact Information].

Best wishes,
Tammy Wilson

Email to candidate to review offer letter

From: workflow@psgccst30.stanford.edu <workflow@psgccst30.stanford.edu>
Sent: Friday, March 6, 2020 10:14 AM
To: pwbwebtesting@stanford.edu
Subject: Test message: Recommendation Sheet with transaction ID: 01829752

Dear Robin Hood,

Institute for Inl Studies has completed its preparation of your postdoctoral appointment paperwork at Stanford University. You must now online to [Insert URL] 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 [Insert Email Address] if you have any questions or concerns about your offer of appointment.

Best wishes,
[Insert Name]
NEW APPOINTMENT
Postdoc Candidate’s View of Offer Letter
PROCESS:
POSTDOC CANDIDATE RETURNS TO SECURE PORTAL
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 $368,238 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
PROCESS:
CONFIRMATION OF OFFER STATUS

Postdoctoral Scholar Appointment Process

- Postdoctoral Scholar Data Form
  Transaction ID: 017331669
  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)
Email Notice to Postdoc Confirming Offer Acceptance

From: workflow@psprcat30.stanford.edu <workflow@psprcat30.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@psprcat30.stanford.edu <workflow@psprcat30.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/
**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)

- **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)

If a document is missing:

HOLD the web form in your workflow until you receive and upload it.

CLICK STEPS:
SUBMIT THE RECOMMEND FORM

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

Confirmation of Submission

Message
Approval submitted for further processing. (25100, 104)
Approval Notice to Admin

From: workflow@psprcuat2.org.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@psprcuat2.org.stanford.edu
To: postdocaffairs@stanford.edu
Cc:
Subject: Test message: Recommendation sheet has been approved.

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 2011-06-02 to 2012-06-31. 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 review your options in which you will need 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!

AI Murray, Postdoctoral Services Manager Office of Postdoctoral Affairs 101 Welch Road Moffett A, Room 84 Stanford, CA 94305-1492 work: (650) 498-7658

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.

<table>
<thead>
<tr>
<th>Approval Schedule</th>
<th>Approval Role</th>
<th>Approver Type</th>
<th>Approval Sequence</th>
<th>Transaction Action</th>
<th>Status Date &amp; Time</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Ranks Sanford</td>
<td>PD-CHA-EQA</td>
<td>Approver</td>
<td>10</td>
<td>Approved</td>
<td>09/10/2011 4:57:55PM</td>
<td></td>
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<tr>
<td>2 Alistair Murray</td>
<td>PD-CHA-EQA</td>
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<td>10</td>
<td>Peer Added</td>
<td>09/10/2011 4:57:55PM</td>
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<tr>
<td>3 Ranks Sanford</td>
<td>PD-SEP-ADMIN</td>
<td>Approver</td>
<td>20</td>
<td>Peer Added</td>
<td>09/10/2011 4:57:55PM</td>
<td></td>
</tr>
<tr>
<td>4 Shannon Randal</td>
<td>PD-SEP-ADMIN</td>
<td>Approver</td>
<td></td>
<td>Peer Added</td>
<td>09/10/2011 4:57:55PM</td>
<td></td>
</tr>
</tbody>
</table>
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
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

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
• 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:
PROCESS:
PAYING POSTDOCS

• OPA’s responsibilities:
  • Create Student ID (Empl ID)
  • Term Activation in PeopleSoft Student Administration
  • Set up a Benelogic record

• Department responsibilities:
  • Benelogic 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

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

https://doresearch.stanford.edu/research-administration/proposal-preparation-submission/rates#fringe-benefit-rates
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/8iabjanys7wgaykqkbywmsgcpp8ckh6

## 2022 MONTHLY CONTRIBUTION RATES

<table>
<thead>
<tr>
<th></th>
<th>Total Cost</th>
<th>Institutional Cost</th>
<th>Your Monthly Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Medical</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postdoc Only</td>
<td>$822.70</td>
<td>$822.70</td>
<td>$0.00</td>
</tr>
<tr>
<td>Postdoc + Spouse/Registered Domestic Partner</td>
<td>$1,675.83</td>
<td>$1,424.45</td>
<td>$251.38</td>
</tr>
<tr>
<td>Postdoc + Child(ren)</td>
<td>$1,346.76</td>
<td>$1,144.74</td>
<td>$202.02</td>
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<tr>
<td>Postdoc + Family</td>
<td>$2,333.99</td>
<td>$1,903.09</td>
<td>$350.10</td>
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<tr>
<td><strong>Dental</strong></td>
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<td></td>
</tr>
<tr>
<td>Postdoc Only</td>
<td>$41.42</td>
<td>$41.42</td>
<td>$0.00</td>
</tr>
<tr>
<td>Postdoc + Spouse/Registered Domestic Partner</td>
<td>$81.42</td>
<td>$41.42</td>
<td>$40.00</td>
</tr>
<tr>
<td>Postdoc + Child(ren)</td>
<td>$71.42</td>
<td>$41.42</td>
<td>$30.00</td>
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<tr>
<td>Postdoc + Family</td>
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<td>$41.42</td>
<td>$70.00</td>
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<tr>
<td><strong>Vision</strong></td>
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<tr>
<td>Postdoc Only</td>
<td>$8.47</td>
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<td>Postdoc + Spouse/Registered Domestic Partner</td>
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<td>Postdoc + Family</td>
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<td>$8.47</td>
<td>$15.91</td>
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<td><strong>Extended Travel Assistance</strong></td>
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</tr>
<tr>
<td>Postdoc + Eligible Family Members**</td>
<td>$1.25</td>
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<td>$1.25</td>
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<tr>
<td><strong>Disability, Life and AD&amp;D</strong></td>
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<tr>
<td>Short-Term Disability</td>
<td>$15.50</td>
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<tr>
<td>Long-Term Disability</td>
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<tr>
<td>Basic Life</td>
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<td>$0.00</td>
</tr>
<tr>
<td>Basic Accidental Death &amp; Dismemberment</td>
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<tr>
<td><strong>Postdoc Assistance Program (PAP)</strong></td>
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<tr>
<td>Postdoc + Household Members</td>
<td>$1.54</td>
<td>$1.54</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

* 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.
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

https://postdocs.stanford.edu/current-postdocs/navigating-your-individual-development-plan-idp/your-individual-development-plan
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

• 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

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 Nolij 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

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 Nolij 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 Nolij a PDF of H-1B/E-3 Visa Request Form and required supporting documents

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
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
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

<table>
<thead>
<tr>
<th>Request Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment dates change</td>
</tr>
<tr>
<td>Faculty change</td>
</tr>
<tr>
<td>Funding change</td>
</tr>
<tr>
<td>Research Experience / PGY change</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Request Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment dates change</td>
</tr>
<tr>
<td>Faculty change</td>
</tr>
<tr>
<td>Funding change</td>
</tr>
<tr>
<td>Research Experience / PGY change</td>
</tr>
</tbody>
</table>
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

• Appointent End Date Change
  New Appointment Start Date: 09/01/2022

• Post Graduate Year (PGY): 
  Message: You have changed the appointment start date of this postdoc. Continue? (25400,133)
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

---

**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

**Total Experience with Reappointment Term Included:** 60 Months
• “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
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
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
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
CLICK STEPS:
CHANGE FORM POSTDOC ADMIN NOTICES

Admin Web Form Submission Notice

Admin Email Approval Notice after OPA Approval

From: workflow@appscai30.stanford.edu
To: postdocaffair@stanford.edu
Cc:  
Subject: Test message: AppointmentDate,Fund,Faculty Change request for Annie, 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: wisheng@stanford.edu, woodys@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@pgpcpr01.stanford.edu, workflow@pgpcpr01.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 if you have any questions about this confirmation.

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
• 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

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

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/sites/default/files/samplenoticeearlytermination.docx)

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

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
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:* [Input Field]

*Acad Org:* [Input Field]

*Student Email:* Robinhood90@gmail.com

*Academic Program:* ESS, Earth System Science

*Academic Sub-Plan:* Earth System Science (PD)

*Academic Program Status:* Active

*Date of Appointment*:

- Start Date: 09/01/2022
- End Date: 11/30/2025

*New End Date:* [Input Field]

*Action Reason:* [Input Field]
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
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
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

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
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
Click Steps: Certificate of Training Box

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

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**Admin Information**

<table>
<thead>
<tr>
<th>Admin:</th>
<th>05707079</th>
<th>Admin Name:</th>
<th>Tammy Wilson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Email:</td>
<td><a href="mailto:psoc-dev-emails@stanford.edu">psoc-dev-emails@stanford.edu</a></td>
<td>Admin Phone:</td>
<td>650/300-1283</td>
</tr>
</tbody>
</table>

- **I understand that:**
  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 and 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 not be notified via email upon approval of this form by OPA. Please notify GME if applicable.
PROCESS:
TERMINATION FORM EMAIL NOTICES

Confirmation of Form Submission to Admin

Approval Email Notice to Admin

Email Notice to Postdoc and Benefits

Confirmation of Form Submission to Admin

Approval Email Notice to Admin

Email Notice to Postdoc and Benefits
• 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
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
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
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

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

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

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