Refresher Training: PD Web Forms and Tips & Tricks

Tammy Wilson & Al Murray
MSOB x140: September 17, 2015
9:30am – 11:30am
Agenda

- Confidential Information
- Reviewing Information in PD Web Forms
- Tips for Inviting Postdoc and Approving Data
- Tips for Recommendation Form
- Searching for Records in PD Web Forms
- Paying Postdocs
- Oct. 1st Salary Change Requirements
- LOA Forms
- Departmental Transfers
- Termination Codes
- Postdoc Benefits
- Job Aids for PD Web Forms
Confidential Information
Confidentiality of PD Web Forms

- Information entered in PD Web Forms is part of Student Records.
  - Postdoc can request to view student records.
- System sends notification to Postdoc of any change being made to the system at the request for the change and the approval of the change.
- Confidential funding, performance reviews or other sensitive information should *not* be entered into PD Web Forms.
Confidentiality of PD Web Forms

- IDP forms that are required for 5th & 6th year extensions should be submitted to OPA manager along with PI Justification, updated CV, Research Experience calculator and Notice of Award or accepted offer letter (if applicable).
- Initial IDP and Annual IDP forms contain sensitive data and should not be uploaded to PD Web Forms.
Inviting Postdocs
Tips for Inviting Postdoc

- Navigation to Invite page (see next slide) is within PeopleSoft, not Postdoc Administrative Forms (Axess). Use non–Stanford email address to invite.

- DO NOT send a 2nd invitation to the same email address. PD Web Forms will remember only the 1st invite and Postdoc will not be able to accept Offer Letter in SecurePortal.

- If faculty sponsor cannot be found to add to invite, you must email reg-courses@stanford.edu to request addition to the instructor/advisor table. Faculty sponsor must be a member of the professoriate. You cannot proceed until confirmation is received from Registrar’s Office and faculty has been added to table.
New Department: Navigation to STF PostDoc Invite
Add a New Value, complete Stf Postdoc Invite page:

1. Modify email text for clarification (e.g. Department/Division);
2. DO NOT remove language, only add;
3. Send to generate invitation and email notification to postdoc.

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Dear,

Alistair Murray in the Stanford University has initiated the process of your postdoctoral appointment at Stanford. Please go to http://secureportal.stanford.edu, register as a new user on the site, and complete the "New Postdoctoral Scholar Data Form."

Once registered and logged-in to SecurePortal.stanford.edu, please click on "New Postdoctoral Scholar Data Form" to begin completing your information. In the form you will provide your demographic information, academic history, and upload the required documents listed below. If you have any questions about this form, please check http://postdocs.stanford.edu/incoming_scholars/prior_to_arrival.html.

**Required Documents** (in .pdf format):

1. Your doctoral diploma. If you do not have a diploma, an official letter from your university showing your completion of your doctoral degree requirements is necessary.
2. Your current CV.
3. If you are not a US citizen, include:
When completing the Data Form in SecurePortal, the postdoc will be reminded to use his non-Stanford email account.
....More than once.....
Tips for Approving Data Form in PD Web Forms
Data Form Information Review

- Data Form is submitted by Postdoc in SecurePortal web site
  - IMPORTANT: Once “approved” by role #1 admin, the data form is locked and cannot be edited by anyone.
  - If any information is incorrect, you must “RETURN” to the postdoc for correction (via Workflow).
  - Do not DECLINE as this removes transaction from system and will require a new invitation with different non–Stanford email address.
  - Use documents uploaded to the Data Form by invited postdoc to check eligibility and research experience.
If Postdoc has trouble uploading documents, ask them to be emailed to you. You can verify appointment eligibility and add them to the Recommendation Form.

TIF, PNG and DOCX are not supported formats.

This is the reason for the postdoc stating “the documents were there but now they are gone”. One bad document causes all to disappear.

Submit HelpSU ticket to OPA after submission of form. Note transaction ID on ticket. OPA can remove bad document(s) so that all others can be seen, but ONLY after submission of Data Form.
Reviewing International Postdocs

- International Postdocs – data MUST MATCH PASSPORT’s machine-readable text

- Dual Citizenship – must use the citizenship on the passport they will be using to enter the US

- Birthdate – must be USA format (mm/dd/yyyy)

- Funding – in US$

- Bechtel only approves Research Scholars – Clinical Scholar visas are approved by ECFMG & GME
US Postdocs – Biographical Details entered on Data Form must match I–9 documentation, e.g., social security card, etc.

Documentation will be required by Payroll prior to payroll processing.

Review Gateway to Financial Activities:

http://web.stanford.edu/group/fms/fingate/staff/payadmin/payadmin_student.html
Tips for Recommendation Form in PD Web Forms

Do not submit for approval unless requirements for approval by OPA have been met
Upload Documents on Recommendation Form

- Required documents not uploaded by Postdoc, e.g., degree conferral, can be uploaded by you to Recommendation Form.

**Funding Details**

Please enter the funding amount and a description of funding sources supporting this postdoctoral appointee. The text you enter in the description 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.

- **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:** 0.00  **Total Annual Amount:** 53000.00

**Department Administrator**

- **Admin:** 05281577  
- **Amelia Pansome**
- **Phone:** 650/735-0129  
- **Email Addr:** pscs-dev-emails@stanford.edu

**Supporting Documents**

- [Upload Here!](#)
How to Upload Documents after submission of Recommendation Form

- If you need to upload documents after the Recommendation Form has been submitted, you must navigate to the form in PeopleSoft:
  - Campus Community
  - Stf Postdoc
  - Post Doc Transactions
  - Stf Postdoc Recommendation

- Upload in Workflow is no longer an option
Academic Information section

- Non-degree granting Programs, e.g. Freeman Spogli Institute, Dean of Research, Woods Institute, BioDesign, all use the “Other Associations” field and the Academic Program of the faculty sponsor.
- Only School of Medicine divisions use Academic Sub-Plan field.
- INCOMPLETE Academic Information will result in return of Recommendation Form.
Admin must carefully review research experience months with the CV to determine if any postdoctoral research time should be excluded after doctoral degree conferral.

Enter months in Research Experience, noted by Department field on Recommendation Form (see next slide). Review University Policy to determine if time should be discounted.

Use the Research Experience Calculator spreadsheet to assist:

http://postdocs.stanford.edu/admin/how-to/prior_experience.html

If you are still unsure of your calculations, please submit HelpSU ticket; category: Central Office Issues, Postdoctoral Affairs, with CV attached.

IMPORTANT REMINDERS:

Once Rec Form is approved by OPA, this field cannot be changed. It must be correct or form will be returned for correction, approval and a 2nd acceptance of offer letter by the postdoc.

Minimum salary level is determined by number of months admin enters on the recommendation form.

Prior research experience impacts the length of time a postdoc can stay at Stanford and minimum salary level.
## Years of Research

<table>
<thead>
<tr>
<th><strong>Appointment Information</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Area of Research/Training - Position description:</strong></td>
</tr>
<tr>
<td>basic research in cardiovascular development and disease</td>
</tr>
<tr>
<td><strong>Appointment Start Date:</strong> 02/24/2015</td>
</tr>
<tr>
<td><strong>Appointment End Date:</strong> 02/23/2016</td>
</tr>
<tr>
<td><strong>Offer Letter date:</strong> 01/29/2015</td>
</tr>
<tr>
<td>Will the postdoctoral scholar conduct research outside of Stanford University campus?</td>
</tr>
<tr>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>If yes, list location(s):</td>
</tr>
<tr>
<td>Will the postdoc work in a laboratory?</td>
</tr>
<tr>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Is this a biosciences lab?</td>
</tr>
<tr>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Is this a joint appointment Instructor/Clinical Instructor?</td>
</tr>
<tr>
<td>☐ Yes ☐ No</td>
</tr>
<tr>
<td>Research Experience since last conferral date: 12 Months</td>
</tr>
<tr>
<td>Research Experience, noted by department: 36 Months</td>
</tr>
<tr>
<td>If the post doctoral scholar has an MD, will he or she have patient contact?</td>
</tr>
<tr>
<td>☐ Yes ☐ No</td>
</tr>
</tbody>
</table>
Outside Funding Letters

- Must provide a start and end date.
- Must state a specific funding amount (salary range not acceptable).
- Must be in US $, use www.oanda.com for conversion rates.
Outside Funding Letters

- Postdocs on External, Direct-Pay Funding
  - Award Letter should be uploaded by Postdoc to Data Form
    - Upload copies of award letters to Rec Form if extending appointment and email confirmation of upload to OPA postdoc manager.
    - External funding entered in GFS as “Info Only” stipend lines.
    - Other currencies must be converted to US dollars.
      - [www.oanda.com](http://www.oanda.com) is a good resource for currency exchange rates.
      - **REMINDER**: Double-check that currency exchange rates have not caused a postdoc to fall below funding minimums.
    - External funding must be supplemented by department funds if below the required minimum.
Offer Letter in Recommendation Form

“Area of Research Training and Research Description” feeds to the middle of a sentence – please be sure to double check this language and punctuation prior to submission.

If “additional details” are added to the offer letter, please open and review the offer letter for grammatical error and consistency of text.
Checking Offer Letter

<table>
<thead>
<tr>
<th>Academic Information</th>
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</thead>
<tbody>
<tr>
<td><em>Academic Career:</em></td>
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<tr>
<td>GR Graduate</td>
</tr>
<tr>
<td><em>Academic Program:</em></td>
</tr>
<tr>
<td>CHEM Chemistry</td>
</tr>
<tr>
<td><em>Academic Plan:</em></td>
</tr>
<tr>
<td>CHEM-PD Chemistry (PD)</td>
</tr>
<tr>
<td>Academic Sub-Plan:</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Other Stanford</td>
</tr>
<tr>
<td>Associations:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Area of Research/Training - Position description:</em></td>
</tr>
<tr>
<td>the exciting world of chemical reactions</td>
</tr>
<tr>
<td><em>Appointment Start Date:</em> 08/02/2011</td>
</tr>
<tr>
<td><em>Appointment End Date:</em> 08/31/2012</td>
</tr>
</tbody>
</table>

Will the postdoctoral scholar conduct research outside of Stanford University campus? [ ] Yes [ ] No
If yes, list location(s): SLAC
Research Experience since last referral date: 2 Months
Research Experience, noted by department: 2 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

254 characters left

<table>
<thead>
<tr>
<th>Funding Details</th>
</tr>
</thead>
</table>
Where to add more information in the offer letter...

Additional details regarding this appointment to be included in the offer letter in your position you will also be ....
Form Saved

- Prior to viewing, Rec Form must be saved
Then you can Click on Offer Letter, verify completeness and formatting before you submit the Form.

- Scroll to top or bottom of form and open draft offer letter. Note:Editable text will be highlighted in yellow.
August 2, 2011

FROM: Jeffrey Koseff, Department of Chemistry
Stanford University
Stanford, CA 94305

TO: Annie Rannie
PO Box 8888
Stanford, CA, USA 94305

Dear Dr. Rannie:
I am pleased to offer you an appointment as a Postdoctoral Scholar in the Department of Chemistry. This letter is intended to document our understanding of your appointment. As a member of the Stanford academic community, you will be subject to the applicable rules and procedures of the University; many of the policies and procedures that relate specifically to Postdoctoral Scholars are set forth in Research Policy Handbook (RPH) 9.4 and in the Stanford Postdoctoral Scholar Handbook (http://postdocs.stanford.edu/handbook).

During this appointment, you will be involved in the exciting world of chemical reactions. Your initial appointment will begin on August 2, 2011 and end on August 31, 2012. Your total support for the initial year of training will be $33,000, plus certain medical, dental, vision and life insurance coverage through Stanford's Postdoctoral Scholar programs. Your appointment may be terminated prior to the anticipated end date noted above based upon loss of funding, change in programmatic need or unsatisfactory performance on your part. Effective on October 1 of each year of your appointment your funding support may change in order to meet the university's stipend/salary levels of support for postdoctoral scholars in a given academic year. At the end of the initial appointment and subject to the term limits set forth in RPH 9.4 and the Postdoc Handbook, your appointment may be eligible for renewal, based on satisfactory performance, the existence of funding, and programmatic need.

The source of your funding will be from NIH. At this time or during the term of your appointment, if you will receive other funding to support your postdoctoral training at Stanford, you are required to provide a...
Draft Offer Letter: Review Mode

degree has not yet been conferred, a statement of completion of studies from your home institution (Registrar's Office or equivalent) is required before your appointment may start. This statement should indicate the date on which all requirements were completed and the expected date of degree conferral. Send this statement (with a certified English translation) to...

In your position you will also be...

For your records, please print a copy of this letter at postdoctoral appointments at Stanford at http://postdocs.stanford.edu/admin/pdfforms/Terms_and_Conditions_of_Postdoctoral_Offers.pdf
By clicking "Accept" below, you will be sending your acceptance of this offer and its terms electronically to Stanford. As is the case for all postdoctoral scholar appointments at Stanford, this offer is contingent upon approval by the Office of Postdoctoral Affairs. You will be notified by email once this process is completed.

I look forward to you joining the Department of Chemistry. Should you have any questions regarding your appointment, please contact Annelies Ransome by e-mail at pscs-dev-emails@stanford.edu. Please visit the Office of Postdoctoral Affairs website at http://postdocs.stanford.edu (click on the "Incoming
Submission of Appointments for Approval: Required documents

- Prior to approval within your Department and then by OPA, ensure appointment has all required documents for approval.
- If PhD completion has not yet occurred, e.g., thesis review is in process, appoint as VSR instead.
Clinical Trainees

Recommendation Form must contain:

- MD diploma
- CA Medical License (see next slide for exception)
- Patient Care Contact Form
- CV
- Billing Agreement (if applicable, usually Clinical Instructor appointments)
- Passport (if on J1, DS-2019 approval by ECFMG and GME. Upload copy of approved DS-2019 when received.)
Clinical Trainees

- Canadian citizens cannot apply for CA Medical License until resident in CA with a SSN.

- Residents and Clinical Fellows who apply for and are awarded research grants, sponsored projects and fellowships through RMG must have academic appointments with Stanford University. These trainees must be transferred from SH&C to OPA and appointed as clinical trainees.
Postdoctoral Scholars

Recommendation Form must contain:

- Doctoral diploma or University letter of completion (no department letters)
- CV
- Outside Funding Award(s) (if applicable)
- Passport (if international)
- EAD Card (if in F1–OPT status)
- Green Card (if Permanent Resident)
Recommendation Form Workflow

Postdoc admin has two roles in this process:

- **Admin Entry** – creates web form and submits to DFA/Department Manager.
- **Admin Verify** – reviews web form for errors or changes and submits to OPA for approval.
  - A GREYED OUT APPROVAL BUTTON indicates that the postdoc has not accepted the offer letter.
  - IF sufficient proof of degree is not yet available, DO NOT VERIFY/APPROVE – rather, HOLD the recommendation form in admin workflow until proof of degree is received and uploaded.
Searching For Records in PD Web Forms
To Retrieve A Record after Viewing Offer Letter

Postdoctoral Forms

<table>
<thead>
<tr>
<th>Request Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recommendation Form</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Form Transaction ID</td>
<td>[mask]</td>
</tr>
<tr>
<td>Postdoctoral Request Type</td>
<td>[mask]</td>
</tr>
<tr>
<td>First Name</td>
<td>[mask]</td>
</tr>
<tr>
<td>Last Name</td>
<td>Rannie</td>
</tr>
<tr>
<td>Academic Program</td>
<td>[mask]</td>
</tr>
<tr>
<td>Academic Plan</td>
<td>[mask] PD</td>
</tr>
<tr>
<td>Academic Sub-Plan</td>
<td>[mask]</td>
</tr>
<tr>
<td>Transaction Status</td>
<td>[mask]</td>
</tr>
</tbody>
</table>

**Search**

![Search button](image)

**Clear All**
Retrieve All Records or find Student ID
To find Student ID in PD Web Forms

- In Postdoc Administrative Forms – choose Change Request, then Add a New Value:
- Click magnifying glass next to Student ID:
Enter Student Name and LookUp:
Paying Postdocs
Postdocs are paid through GFS. All postdoctoral scholars and clinical trainees appointed through OPA are billed the $125 tuition/registration charge each term. Bills are mailed out by Student Financial Services once a month, if the payment has not already been entered in GFS by their department AND disbursed to their Student Account in Axess.

Mail Code in GFS Aid-Year Activation is where the pay stub is sent for stipend-paid postdocs and where the pay check is sent (if direct deposit is not yet set up).

Salary-paid postdocs can view their pay stub in Axess after first pay day.

Postdocs MUST check Axess to ensure they have a mailing address listed. If no mailing address is listed and online delivery has not been requested, the W2 issued by Payroll will be sent to the home address. International Scholars will have their foreign address listed as home address; a SEVIS requirement for international scholars.

Postdocs cannot change where the pay stub or check is sent by changing their mailing address in Axess. A live pay check is sent to the Mail Code listed on GFS Aid-Year Activation screen. They must contact their GFS Administrator to change the mail code in GFS.

Postdocs should sign-up for direct deposit as soon as possible after 1st pay check is issued.

Review Gateway to Financial Activities:

http://web.stanford.edu/group/fms/fingate/staff/payadmin/payadmin_student.html
The Pilot Go Pass program is offered to postdoctoral scholars residing off Stanford property and within typical daily commuting distances. For more information about eligibility, refer to the pilot program eligibility page on the Parking & Transportation Services web site.

Passes cannot be purchased unless you have an eligible residential address in Axess identified as “Stanford (local) address” or “SEVIS (US)”.

REMINDER: Postdoctoral Scholars must also enter a mailing address in Axess. Payroll will send W2 to this address if online delivery has not been requested. Contact Payroll for information regarding tax forms.
October 1st Minimum Salary Increase

Review your Postdocs to ensure they meet Minimum Funding Requirements
All postdocs must be paid at the appropriate pay level based on years and months of research experience. Reviewed by OPA every year effective October 1st.

- Scholars must be funded at least at the minimum level based on their cumulative years and months of research experience on October 1. Submit Funding Change, Change Request in PD Web Forms to increase funding.

- NOTE: The Funding Change web form does not generate a GFS pay line to increase the postdoc compensation.

- Funding Guidelines and links
    - Salary Calculator built in to PD Web Forms.
Postdocs on External, Direct–Pay Funding

- Upload copy of award letters to Recommendation Form and notify OPA by comment on Change Request.
- External funding must be entered in GFS as “Info Only” stipend line(s).
- Foreign currencies must be converted to US dollars:
  - [www.oanda.com](http://www.oanda.com) is a good resource for currency exchange rates.
  - **REMINDER:** Double–check that currency exchange rates have not caused a postdoc to fall below funding minimums. Do this at least two times every year.
- External funding must be supplemented by department funds if it does not meet the required minimum.
Postdocs on an unpaid Leave of Absence

- End stipend or salary lines in GFS.
- Enter the appropriate salary/stipend rate when postdoc returns from leave.
- If postdoc is on leave for the entire term and no salary/stipend is entered to generate the $125, the fee still has to be paid. Postdocs retain their “active” status in PeopleSoft (no L or P employee status).
- A “FLSHP Tuition” line for the quarter must be entered to avoid the postdoc receiving a bill.
October 1st Salary Changes

- These are done via the Change Transaction form in STF PostDocs.
October 1st Salary Change

- Postdoc Web Form system automatically generates an email notification to the Postdoc and PI when requested change is submitted. Another notification is sent when change is approved.

- Reappointment/Salary Change letter notifications issued by Departments follow local procedures. OPA does not issue these letters.
  - These do not need to be submitted to OPA as email notifications are the OPA approvals.
Leave of Absence (LOA)

Unpaid
LOA Web Form Initiated by Postdoc in AXESS

- Information can be found at http://postdocs.stanford.edu/admin/how-to/leave.html
- Maximum of 3 months unpaid leave with approval of PI and in accordance with Postdoc Benefits and Visa policies.
- Routes to Department for approval prior to routing to OPA.
Postdocs are required to maintain their benefits while on an approved, unpaid LOA. Although customary, faculty mentors are not required to pay for the Stanford health insurance coverage for the Postdoc while on an approved, unpaid LOA. In this instance, a Postdoc must be willing to pay the total cost of their benefits that includes the institutional and Postdoc portion while on an unpaid leave. The Postdoc will be required to enter their banking information in ClearBenefits so that the total premium can be collected through a direct debit to their bank account.

If faculty sponsors/PIs agree to pay the full cost of the University contribution to the postdoc’s benefits, they typically use unrestricted funds and must provide a PTA to which the premiums can be charged.

Faculty sponsors/PIs are required to pay for life/accidental death and disability coverage for their postdocs while on an unpaid LOA.
International postdoc requests are reviewed in light of visa regulations and may not be approved if the leave violates visa requirements.

- International postdocs in J–1 visa status MUST leave the U.S. in order to qualify for an unpaid LOA.

- International postdocs who request an unpaid leave should do so BEFORE the start of the leave's occurrence, and immediately upon learning of the need to take a leave. The University (Bechtel International Center) is required to report infractions in the scholar's SEVIS record.
Departmental Transfers

Helpful Tips
What is a “Departmental Transfer”? 

- A current Stanford postdoc ending their appointment in one Stanford department/division being hired as a postdoc in another Stanford department/division.
- IMPORTANT: Transfer must be coordinated with the other department to comply with visa policies and ensure continuation of pay and ID Card privileges.
Departmental Transfer Steps

1) Current department/division must go into PD Web Forms and choose “Termination Form” and select “Departmental Transfer” as the reason for termination.

2) New department/division must hire the postdoc via STF Postdoc Invite and complete the Information Sheet & Recommendation Form process.

   **IMPORTANT:** Postdoc *cannot* use their existing Stanford Email Address (@stanford.edu) anywhere in the Transfer Appointment process or the non-Stanford email used in the previous appointment.
## Postdoctoral Forms

### Request Type

- Recommendation Form
- Termination Form
- Change Transactions

<table>
<thead>
<tr>
<th>Field</th>
<th>Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Form Transaction ID</td>
<td></td>
</tr>
<tr>
<td>EmplID</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
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<tr>
<td>Last Name</td>
<td></td>
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<tr>
<td>Academic Program</td>
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<td>Academic Plan</td>
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<tr>
<td>Academic Sub-Plan</td>
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<tr>
<td>Transaction Status</td>
<td></td>
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</tbody>
</table>

[Add] [Search] [Clear All]
**POSTDOCTORAL SCHOLAR TERMINATION FORM**

* Required field  + Must match passport

<table>
<thead>
<tr>
<th>Bio Demo</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student ID:</strong> 05779467</td>
</tr>
<tr>
<td>Student Email: Annie <a href="mailto:Rannie@yahoo.com">Rannie@yahoo.com</a></td>
</tr>
<tr>
<td>Acad Program: CHEM, Chemistry</td>
</tr>
<tr>
<td>Fellowhsip / Program:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dates of Appointment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date:</strong> 08/02/2011</td>
</tr>
<tr>
<td><strong>End Date:</strong> 08/31/2012</td>
</tr>
<tr>
<td>*New End Date:</td>
</tr>
<tr>
<td>*Action Reason:</td>
</tr>
</tbody>
</table>

**Enter Termination Date here**

<table>
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<th>Forwarding Information</th>
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<tbody>
<tr>
<td><strong>Address Line 1:</strong></td>
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<td><strong>City:</strong></td>
</tr>
<tr>
<td><strong>State:</strong></td>
</tr>
<tr>
<td><strong>Email ID:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Professional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Position Title:</strong></td>
</tr>
<tr>
<td><strong>Type of Position:</strong></td>
</tr>
<tr>
<td><strong>New Institution or Company:</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Foreign Scholars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa Type: UN</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Certificate of Training</th>
</tr>
</thead>
</table>
### Look Up *Action Reason*

#### Program Action:
- **Discontinuation**

#### Action Reason:*
- Begins with: 
- Description: Begins with:

#### Search Results
- **PACC**: Accepted another position
- **PDEP**: Department Transfer
- **PEAR**: Early Termination
- **PEND**: End of Appointment Term
- **PPER**: Personal/Family Reasons
- **PQWN**: Quit without Notice
- **PRES**: Resignation
- **RRTN**: Failure to Return from LOA

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**Student Email:** @yahoo.com

**Acad Program:** CHEM Chemistry

**Acad Sub-Plan:** Fellowship / Program:

**Start Date:** 08/02/2011

**New End Date:** [31]

**New Position Title:**

**Type of Position:**

**New Institution or Company:**

**Foreign Scholars**

**Visa Type:**

**Expiration Date:**
Department Transfer follows same procedure as a New Appointment:

A non–Stanford email address must be used: e.g. yahoo, gmail, hotmail email account (not @stanford.edu, must be different than email address used on previous appointment invite)

Remember to Add a New Value when creating the Invite
When completing Data Form, the postdoc will be reminded to use his non–Stanford email account, not SUNet ID email.
Go to PostDoc Administrative Forms in Axess to start Recommendation Form
Select “YES” for Department Transfer

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

Select PostDoc Data Form:  00791322

Postdoctoral Request Type:

Is this request for Department Transfer: No

Supporting Documents

Save  Submit  Back  Print
Termination Codes

How to Choose the Right Code
Termination Codes

- **PACC – Accepted another position**
  - Use when postdoc ends appointment early to take another position

- **PDEP – Department transfer**
  - Use when postdoc is transferring to a new postdoc position in another Stanford department

- **PEAR – Early termination**
  - Use when PI/Department ends appointment early due to loss of funding, change in programmatic need, or poor postdoc performance
  - Early termination procedures apply, please see [http://postdocs.stanford.edu/admin/how-to/early_term.html](http://postdocs.stanford.edu/admin/how-to/early_term.html)

- **PEND – End of appointment term**
  - Use when postdoc has *substantially completed* the appointment term

- **PPER – Personal/family reasons**
  - Use when postdoc ends appointment early for personal reasons

- **PQWN – Quit without notice**
  - Use when postdoc ends appointment early without notice

- **PRES – Resignation**
  - Use when postdoc resigns appointment early

- **RRTN – Failure to return from LOA**
  - Use when postdoc fails to return from an approved leave of absence
Postdoc Benefits:
Current Year Rates, ACA Minimums, Waiving Stanford Coverage, and Postdoc Paid Insurance
### Year 2015 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.

<table>
<thead>
<tr>
<th>Medical – Stanford HealthCare Alliance (SHCA)</th>
<th>Monthly Cost</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Postdoc Only</td>
<td>$571.16</td>
<td>$571.16</td>
<td>$0.00</td>
</tr>
<tr>
<td>Postdoc + Spouse/Registered Domestic Partner</td>
<td>$1,256.65</td>
<td>$1,006.24</td>
<td>$251.31</td>
</tr>
<tr>
<td>Postdoc + Child(ren)</td>
<td>$1,028.10</td>
<td>$873.88</td>
<td>$154.22</td>
</tr>
<tr>
<td>Postdoc + Family</td>
<td>$1,713.49</td>
<td>$1,456.47</td>
<td>$257.02</td>
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<table>
<thead>
<tr>
<th>Medical – Blue Shield of California PPO</th>
<th>Monthly Cost</th>
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</thead>
<tbody>
<tr>
<td>Postdoc Only</td>
<td>$619.71</td>
<td>$571.16</td>
<td>$48.55</td>
</tr>
<tr>
<td>Postdoc + Spouse/Registered Domestic Partner</td>
<td>$1,363.37</td>
<td>$1,006.24</td>
<td>$358.13</td>
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<tr>
<td>Postdoc + Child(ren)</td>
<td>$1,115.49</td>
<td>$873.88</td>
<td>$241.61</td>
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<tr>
<td>Postdoc + Family</td>
<td>$1,859.14</td>
<td>$1,456.47</td>
<td>$402.67</td>
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<table>
<thead>
<tr>
<th>Dental – Delta Dental PPO</th>
<th>Monthly Cost</th>
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</thead>
<tbody>
<tr>
<td>Postdoc Only</td>
<td>$38.20</td>
<td>$38.20</td>
<td>$0.00</td>
</tr>
<tr>
<td>Postdoc + Spouse/Registered Domestic Partner</td>
<td>$78.99</td>
<td>$38.20</td>
<td>$40.19</td>
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<tr>
<td>Postdoc + Child(ren)</td>
<td>$75.37</td>
<td>$38.20</td>
<td>$37.17</td>
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<tr>
<td>Postdoc + Family</td>
<td>$125.69</td>
<td>$38.20</td>
<td>$87.49</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vision – Vision Service Plan (VSP)</th>
<th>Monthly Cost</th>
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</thead>
<tbody>
<tr>
<td>Postdoc Only</td>
<td>$6.51</td>
<td>$6.51</td>
<td>$0.00</td>
</tr>
<tr>
<td>Postdoc + Spouse/Registered Domestic Partner</td>
<td>$10.97</td>
<td>$6.51</td>
<td>$4.46</td>
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<tr>
<td>Postdoc + Child(ren)</td>
<td>$11.22</td>
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<td>$4.71</td>
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<tr>
<td>Postdoc + Family</td>
<td>$18.73</td>
<td>$6.51</td>
<td>$12.22</td>
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<table>
<thead>
<tr>
<th>Extended Travel Assistance – FrontierMEDEX</th>
<th>Monthly Cost</th>
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</thead>
<tbody>
<tr>
<td>Postdoc + Eligible Family Members**</td>
<td>$1.25</td>
<td>$0.00</td>
<td>$1.25</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Disability, Life and Accident (Standard Insurance Company), Postdoc Assistance Program (ComPsych GuidanceResources)</th>
<th>Monthly Cost</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Term Disability</td>
<td>$15.50</td>
<td>$15.50</td>
<td>$0.00</td>
</tr>
<tr>
<td>Long Term Disability</td>
<td>$1.83</td>
<td>$1.83</td>
<td>$0.00</td>
</tr>
<tr>
<td>Life</td>
<td>$1.00</td>
<td>$1.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Accident</td>
<td>$0.35</td>
<td>$0.35</td>
<td>$0.00</td>
</tr>
<tr>
<td>Postdoc Assistance Program (PAP)</td>
<td>$1.14</td>
<td>$1.14</td>
<td>$0.00</td>
</tr>
<tr>
<td>**Total (Disability, Life and Accident, PAP)</td>
<td>$19.82</td>
<td>$19.82</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Medical Benefits must include:

- Ambulatory Patient Services
- Emergency Services
- Hospitalization
- Maternity and Newborn Care
- Mental Health/Substance Use Disorder Services (including behavioral health treatment)
- Prescription Drugs
- Rehabilitative and Habilitative Services and Devices
- Laboratory Services
- Preventative and Wellness Services and Chronic Disease Management
- Pediatric Services, including Oral and Vision Care

Additional requirements for the policy:

- No pre-existing condition clauses or exclusions
- Cannot charge higher premium for women than men
- Medical plan must cover at least 60% of medical expenses (75% for J1 Visa holders)
- No lifetime or annual limits on dollar value of benefits
- Out-of-pocket maximum cannot exceed $6,600/individual and $13,200/family
- Deductibles can vary, but cannot exceed the out-of-pocket maximum
Outside health plans must substantially meet ACA minimums to waive Stanford Benefits

- There can be no maximum medical benefit limits;
- No waiting periods or exclusions;
- Regardless of gender, there must be coverage for maternity and newborn care;
- Coverage for preventative care (routine exams and lab screenings);
- Mental & Substance abuse coverage (no maximum visits);
- Chronic disease management;
- Prescription coverage;
- Emergency and ambulatory services;
- Hospitalization
A separate policy exception is required for externally funded postdocs who have funding above the minimum requirement and the department requests the postdoc to pay for the institutional portion of the benefits expense.

PD Web Forms Job Aids
PD Web Forms Job Aids

- Step-by-step instructions for all actions in PD Web Forms can be found at:
  [http://postdocs.stanford.edu/admin/how-to/job_aids.html](http://postdocs.stanford.edu/admin/how-to/job_aids.html)
Upcoming Refresher Training Session

OPA–1351–091715
9:30am – 11:30am
MSOB x140

Thank you!
Questions?