Postdoctoral Administrators Quarterly Meeting

July 26, 2012
10:00 a.m. – 11:30 a.m.
LKSC 130
Agenda

• GFS Topics: Tips/Reminders for Postdoc Entry & Unapplied Aid
• Leave of Absence Form
• Submission of Early/Incomplete Recommendation Forms
• Uploading Additional Documents to the Recommendation Form
• Confirmation of Reappointment Document
• Reporting Social Security Numbers to OPA
• Mentoring Expectations, Requirements and Form
• Upcoming Workshops and Courses
GFS Topics: Tips/Reminders for Postdoc Entry & Unapplied Aid

Shannon Monahan
GFS Topics

What I found while running the Unapplied Aid Report

- Salary paylines where TAL was not recalced
- Salary paylines where TAL was re-calc’d but the TAL line was not completed on the Assist TAL tab
- Both TAL and TUT were entered (likely that TUT was entered first, TAL entered later, but TUT never removed for applicable quarters)
- Suspicion: rejecting a TUT line is not enough—it needs to be cancelled after the fact as well
- There were *salary* pay lines in GFS that extended beyond the reported Termination date!
- Postdocs incorrectly Aid-Year activated
GFS Topics

Salary Line Termination

When a salary line is terminated earlier than originally expected, TAL for successive quarters may need to be removed. If this is the case:

• Terminate the salary pay line as necessary.
• Click on the Calc TAL button for the salary line that was just terminated.
• On the Assist TAL tab, the TAL Calc Total should change to reflect the new TAL owed. Click on the Detail button to make sure all aid is removed (example following).
• Set the line to Completed (C) in the Status box, and click on Save at the bottom of the page.
• The pay line will then be routed for approval as appropriate.
GFS Topics

• Sometimes, unapplied aid wasn’t really removed...

Unapplied Aid for Winter and Spring
GFS Topics

TAL001 looks OK, right?
So what’s the problem?
GFS Topics

Click on Detail.

Notice: line totals still have Spring and Summer with $125
GFS Topics

Click on View All.
Notice that the $125 for the Spring and Summer are still entered in the Amount field.
GFS Topics

Note: it is not enough to zero the amount—you still need to zero out the Allocation

Click on the Allocation check box for Spring, enter 0 (zero) into the Amount field, and tab out! Repeat for summer.
GFS Topics

Scroll to top to verify that there are no line totals left, and then click OK.
GFS Topics

Now complete the line, and press Save to route for Approval.
GFS Topics

Stipend Line Termination

• When ending stipend lines due to postdoc termination, remember to remove any necessary TUT lines/quarters from the FLSHP Tuition tab.

• Sometimes, postdocs will move from stipend to salary. In these cases: Remember to remove any TUT for any quarters that they will have a salary payment.

• TAL over TUT in all cases
GFS Topics

Disbursement Plans

• For salary, stipend, and Info-Only lines:
  – **NM-Payroll** (not Qtr, not Sem, ...)

• For TAL and TUT:
  – Qtr (AWSS, AWS, ...)

Office of Postdoctoral Affairs  postdocs.stanford.edu
GFS Topics

Aid Year Activation

• Postdocs should be activated as PD (not NM)
• Postdocs should not be activated as GRPD for more than one quarter
  – Should only be used when the postdoc is transitioning from a PhD student to a PD in the middle of a quarter
  – GR Tuition is charged for quarters with GRPD (not PD tuition)
  – Need to (actively) activate as PD for terms following the first quarter

Note: this must be done at the same time that the GRPD activation takes place—otherwise, the GRPD will keep copying over until the end of the Aid Year; after stipend or salary lines are entered, it may be impossible to go back and fix (still waiting to hear from the GFS gurus on a HelpSU ticket)
GFS Topics

Best Practices

• If a pay period is missed, enter the GFS line as it should have been entered, and send a HelpSU to payroll to have a check cut—do not add the amount to the current/next month.

• If a postdoc is funded from an outside foreign source, periodically check the exchange rate to make sure that their pay is still meeting the minimums.
GFS Topics

Best Practices

• When terminating pay lines, make sure to fully Complete (C) the pay lines, not just put them in Pending status. When I run my reports, it doesn’t look disbursed.

• For maternity leaves and LOAs, terminate pay lines completely—lines should not be set to pending and then re-completed when the postdoc returns. New lines should then be entered upon their return.
GFS Topics

Going Forward, Expect...

• To be asked to clear Unapplied Aid on a more regular basis
• To keep up to date with TAL and TUT entry
• Enter in any and all necessary Info-Only lines, including Maternity Disability lines

In return, I will work on...

• Getting the ReportMart1 Unapplied Aid Report to work more effectively for postdoc administrators (export to Excel?)
• Getting a report that shows outstanding tuition bills for postdocs
Leave of Absence Form

Annelies Ransome
Leave of Absence (LOA)

• Form now on AXESS
• Postdoc Requests Form online
• Routing Goes through usual workflow
• Is Received and Reviewed by OPA
• J-1 Visa Regulations Apply
• Submit *prior* to start of LOA
• LOA form not used for maternity leave

• Live Now!
LOA Form is under “Personal Information” Menu Bar
Postdoc Uses Drop Down Menu

Postdoctoral Forms
Choose request type and Continue.

Request Type
- International Activity Reporting
- Leave Of Absence

Continue Back
# Postdoc’s View of LOA Form

## POSTDOCTORAL SCHOLAR UNPAID LEAVE OF ABSENCE REQUEST

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

### Bio Demo

<table>
<thead>
<tr>
<th>Student ID:</th>
<th>0987654</th>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Acad Org:</td>
<td>MICRO/ IMMUN</td>
<td>Microbiology and Immunology</td>
</tr>
<tr>
<td>Acad Plan:</td>
<td>Microbiology &amp; Immunol (FD)</td>
<td>Acad Sub-Plan:</td>
</tr>
<tr>
<td>Faculty Mentor:</td>
<td></td>
<td>Appointment End Date: 06/31/2013</td>
</tr>
</tbody>
</table>

### International Scholars

<table>
<thead>
<tr>
<th>Visa/Permit Type:</th>
<th>J1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa permit end date:</td>
<td>08/31/2013</td>
</tr>
<tr>
<td>Other Visa type:</td>
<td></td>
</tr>
</tbody>
</table>

*Will you remain in US during your leave period: | |

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Information that must be completed in the LOA Form

**All Scholars**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave request From</td>
<td></td>
</tr>
<tr>
<td>Leave request To</td>
<td></td>
</tr>
<tr>
<td>Reason for Leave</td>
<td></td>
</tr>
<tr>
<td>Explanation for Leave</td>
<td></td>
</tr>
</tbody>
</table>

- Are you currently on the Postdoc Health Insurance plans at Stanford?
- If externally-funded, I have obtained approval from my funding agency for this leave:

[Submit]  [Return to Postdoc Forms]  [Print]
LOA Form Successfully Submitted

Message

Your request for a Leave of Absence has been submitted and routed for approval. (25403,109)

OK  Cancel
Submission of Early or Incomplete Recommendation Forms

Tammy Wilson
Submission of Early or Incomplete Recommendation Forms

• Early Submission is when you are asked to generate an offer letter several months ahead of the start date of the appointment.
• This often means that not all documents, especially proof of degree, is available.
• What to do?
  1. Admin creates and submits Recommendation Form
  2. DFA/Chair/Proxy approves Rec Form (generates offer letter)
  3. Postdoc accepts offer letter online
  4. Rec Form comes back to Admin workflow for verification/approval and submit to OPA.
  5. Admin should HOLD REC FORM in admin (your) workflow until you receive all the documents.

**Do not submit incomplete appointment paperwork too far in advance of the start date. This Rec Form may be returned to you. Process will restart.**

**Do not submit a Recommendation to appoint without an accompanying submission of a DS-2019.**

If you are interested in submitting an early appointment, you must be ready to submit an early DS-2019 at the same time.

(The above instructions should not be confused with the conditional appointment process sometimes granted to accommodate the required 8 week advance visa processing time)
Uploading Additional Documents to Recommendation Form

Tammy Wilson
Uploading Additional Documents to Recommendation Form

• After submission of the Recommendation Form, Admins may upload additional documents to the postdoc record – i.e., copy of diploma, notice of award letter, reappointment confirmation, etc.

• Consider the Rec Form Documents are the “online file” of the postdoctoral scholar
How to add a document to an existing postdoc record in PS

— Only possible for appointments that started in the system. Not possible for legacy records.
— Search for existing Recommendation Form in AXESS
  • Click on “Postdoc Administrative Forms”
  • Click on “Recommendation Form”
  • Enter postdoc “First Name” and “Last Name”, click “SEARCH”
  • In Search Results, click on the “Transaction ID” (rec form appears)
  • Scroll down to “Supporting Documents”
  • “Browse” and “Upload” the additional documents
    — NOTIFY OPA staff if necessary when additional documents are uploaded; there is no system-generated upload notice to OPA
Reporting Social Security Numbers to OPA

Tammy Wilson
Reporting SSNs to OPA

- SSNs are classified by the University as “Prohibited Data” and cannot be reported to OPA via email, voicemail, or HelpSU
  - Postdoc or Admin should complete the SSN Reporting Form available here: [http://postdocs.stanford.edu/admin/pdfforms/SocialSecurityReportingForm.pdf](http://postdocs.stanford.edu/admin/pdfforms/SocialSecurityReportingForm.pdf)
  - Payroll I-9 Notice includes link to OPA SSN form
  - Please type in SSN and Stanford ID; illegible chicken scratch = processing delay (fillable form; do not “save” a completed SSN form to your machine)
  - Fax SSN form to 5-6106 (fax is in a locked room) or hand-deliver to 1215 Welch Road, Modular A, Room 88
Mentoring Expectations, Requirements and Form

Rania Sanford
Beyond Paperwork: Administrator Roles

• Local Orientations, directing/facilitating support resources, advocate for your postdocs

• Mentoring Initiative
  – Required for any extensions beyond 4 years
  – Will be required in the near future for a broader
  – Resources online for faculty
  – Include Mentoring Form in the materials you give to your incoming postdocs.
Upcoming Trainings
http://postdocs.stanford.edu/admin/profdev.html

• **ClearBenefits Training (Register in STARS):**
  – Future dates will be added to STARS

• **PD Web Forms Training (Register in STARS):**
  – Sept. 13th, 9:30 to 11:30 AM in 1215 Welch Rd. #62
  – Nov. 8th, 9:30 to 11:30 AM in 1215 Welch Rd. #62

• **Policies and Procedures (Register in STARS):**
  – Oct. 11th, 9:30 to 11:30 AM in 1215 Welch Rd. #62

• **Open Labs (Drop-in):**
  – First Fridays of Every Month, 9-noon in 427 Arguello Way
Questions?

Happy Summer!