Postdoctoral Administrators
Quarterly Meeting

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

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

Annelies Ransome
Associate Director for Operations
GFS Redesign

Shannon Monahan
Reporting Analyst
GFS Redesign

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

GFS Center

08
ENROLLMENT ALERTS

15
ENTRY ALERTS

10
Fy1 ALERTS

10
MY APPROVALS

30
PENDING APPROVALS

GFS Aid Entry Search

Graduate Student
Search
+ Advanced Search

PostDoctoral Scholar

Non-Matriculated Student

GFS Menu

Look up Item Type
Request Item Type
GFS Offcycle check
Batch Upload
Legacy GFS

Workflow

My Approvals
My Request pending

Training

PeopleSoft Concepts and Compliance
### GFS Enrollment Alerts

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Message</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-1182-05805002</td>
<td>Ferris Bueller</td>
<td>Student has approved aid, but is in withdraw status for the quarter. Verify enrollment status and adjust aid entry as appropriate.</td>
<td>DISMISS</td>
</tr>
<tr>
<td>2018-1182-00000000</td>
<td>Cameron Frye</td>
<td>Student has an approved 50% assistantship, but is registered for greater than 10 units. Verify enrollment status and adjust aid entry as appropriate.</td>
<td>DISMISS</td>
</tr>
<tr>
<td>2018-1182-99999999</td>
<td>Sloane Peterson</td>
<td>Student has approved aid, but is registered for less than 7 units. Verify enrollment status and adjust aid entry as appropriate.</td>
<td>DISMISS</td>
</tr>
</tbody>
</table>

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GFS Redesign

Sample Postdoc Alerts:

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

• Student's Academic Program has changed; Please review or edit Home Org if needed.

• Aid has been entered AND student is not enrolled.
# GFS Redesign

## POST DOC INFO

<table>
<thead>
<tr>
<th>ID</th>
<th>Cameron Frye</th>
<th>Direct Deposit</th>
</tr>
</thead>
<tbody>
<tr>
<td>US CITIZENSHIP STATUS</td>
<td>International</td>
<td></td>
</tr>
</tbody>
</table>

## ALL AID SUMMARY

<table>
<thead>
<tr>
<th>STIPEND &amp; SALARY SUPPORT</th>
<th>ANNUALIZED AMT</th>
<th>YEARLY AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>MONTHLY STIPEND</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>ASSIST SALARY</td>
<td>$15,000.00</td>
<td>$13,250.00</td>
</tr>
<tr>
<td>OUTSIDE FUNDING</td>
<td>$49,100.04</td>
<td>$40,916.70</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$65,000.04</td>
<td>$54,166.70</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OTHER SUPPORT</th>
<th>TOTAL AMT</th>
<th>TOTAL AMT</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTHER PAYMENTS</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
## GFS Redesign

![GFS Redesign Table](image)

**Office of Postdoctoral Affairs**

postdocs.stanford.edu
GFS Redesign

Expect some changes:

• How does one think about a postdoc’s salary/stipend? Annually! Enter the annual amount into GFS and let the system calculate the pay period amounts for you.

• *Outside Funding* is now its own tab!

• *Other Payments* is now its own tab!
  ➔ Enter bonuses, hardship aid, relocation...
# GFS Redesign

## Project Timeline:

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Acceptance Testing</td>
<td>Business Analysts</td>
<td>Nov 15 – Dec 3</td>
</tr>
<tr>
<td>User Acceptance Testing</td>
<td>Expert Users</td>
<td>Dec 4 – 15</td>
</tr>
<tr>
<td>UI Design Review</td>
<td>Novice Users</td>
<td>Week of Dec 4</td>
</tr>
<tr>
<td>Debug Issues</td>
<td>AS/Developers</td>
<td>Dec 18 – Jan 12</td>
</tr>
<tr>
<td>Round 2 UAT Testing</td>
<td>Analysts/Experts</td>
<td>Jan 15 – Feb 16</td>
</tr>
<tr>
<td>Training Review</td>
<td>Novice Users</td>
<td>Feb 1 – 16</td>
</tr>
<tr>
<td>Training Go Live</td>
<td>All</td>
<td>Mid February</td>
</tr>
</tbody>
</table>

There will also be opportunities to test BI Reporting in January and February.
# GFS Redesign

## Who to talk to?

<table>
<thead>
<tr>
<th>Project Stakeholders</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen Cooper</td>
<td>Financial Aid Office</td>
</tr>
<tr>
<td>Kelly Wright</td>
<td>Financial Management Services</td>
</tr>
<tr>
<td>TJ Fletcher</td>
<td>Student Financial Services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Steering Committee</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Canice Auyeung</td>
<td>FAO</td>
</tr>
<tr>
<td>Nancy Child</td>
<td>FAO</td>
</tr>
<tr>
<td>Vrinda Gopal</td>
<td>Research &amp; Compliance</td>
</tr>
<tr>
<td>Sally Gressens</td>
<td>School of Engineering</td>
</tr>
<tr>
<td>Larry Ibarra</td>
<td>Student Information Sys</td>
</tr>
<tr>
<td>Rebecca Jantzen</td>
<td>VPGE</td>
</tr>
<tr>
<td>Shannon Monahan</td>
<td>OPA</td>
</tr>
<tr>
<td>Shawna Powell-Blunt</td>
<td></td>
</tr>
<tr>
<td>Corrie Potter</td>
<td></td>
</tr>
<tr>
<td>Susan Weersing</td>
<td></td>
</tr>
<tr>
<td>Dave Bunger</td>
<td></td>
</tr>
<tr>
<td>Leo Volkov</td>
<td></td>
</tr>
<tr>
<td>Prashanth Nellore</td>
<td></td>
</tr>
<tr>
<td>Christina Reynolds</td>
<td></td>
</tr>
</tbody>
</table>

Office of Postdoctoral Affairs  postdocs.stanford.edu
Pay Line End and Appointment Termination Dates

Shannon Monahan
Reporting Analyst
Pay Line End & Appointment Termination Dates

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

Tammy Wilson
Postdoctoral Services Manager
New Position Posting Page

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

Create Open Postdoctoral Position

Faculty Sponsor (Last, First Name)
Please enter Last and First name of the faculty who is sponsoring this position

Department Name

Appointment Start Date

Postdoc Appointment Term

Postdoctoral Training Position Description (Edit summary)
New Position Posting Page

GROUP OR DEPARTMENTAL WEBSITE

Add another item

Required Qualifications

Required Application Materials
Research Experience Calculator

Tammy Wilson
Postdoctoral Services Manager
Research Experience Calculator

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

• [https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/calculate-months-experience-research-non-clinical](https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/calculate-months-experience-research-non-clinical)

• Specific calculation instructions are available on this web page and on the calculator

• Please complete all applicable entry fields

• Example of properly completed form on next slide
New appointments with previous research experience:

**Date of Request:** 11/09/17

- **Type of Request:** New appointment with previous research experience

<table>
<thead>
<tr>
<th>Postdoc Name</th>
<th>Department Name</th>
<th>Postdoc Administrator Name</th>
<th>Faculty Sponsor(s) Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotty Smalls</td>
<td>Physical Education</td>
<td>Wendy Peppercorn</td>
<td>Benjamin F. Rodriguez</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Doctoral Degree Institution</th>
<th>Date of Doctoral Degree Conferral</th>
<th>US Citizen or Current Visa Status?</th>
<th>Visa Issue to Address with this Request?</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Irvine</td>
<td>06/01/13</td>
<td>US Citizen</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Research Position(s)</th>
<th>Institution Name</th>
<th>Start Date (mm/dd/yy)</th>
<th>End Date (mm/dd/yy)</th>
<th>Research Experience (in years)</th>
<th>Discontinued Time (in months, enter digits only)</th>
<th>COMBINED RESEARCH EXPERIENCE (in months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postdoctoral Scholar</td>
<td>Cal Poly</td>
<td>09/01/13</td>
<td>01/31/16</td>
<td>2</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Postdoctoral Scholar</td>
<td>UC Berkeley</td>
<td>02/01/16</td>
<td>10/31/17</td>
<td>2</td>
<td>21</td>
<td>21</td>
</tr>
</tbody>
</table>

**COMBINED RESEARCH EXPERIENCE FROM ALL POSITIONS (if reappointment or transfer include current Stanford appointment dates above): 50**

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

<table>
<thead>
<tr>
<th>Requested Start Date</th>
<th>Requested End Date</th>
<th>Research Experience (in years)</th>
<th>Research Experience (in months)</th>
<th>Combined Research Experience (from above)</th>
<th>COMBINED RESEARCH EXPERIENCE WITH NEW TERMS (in months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/01/17</td>
<td>08/31/18</td>
<td>0.83</td>
<td>9.96</td>
<td>49.97</td>
<td>60</td>
</tr>
</tbody>
</table>

Postdoctoral appointment term limit is 60 months. Requests for 60 months combined research experience with new terms can be approved with supporting documents to OPA managers. Requests beyond 60 months require faculty subcommittee review. For more information please see: [http://doresearch.stanford.edu/policies/research-policy-handbook/non-faculty-research-appointments/postdoctoral-scholars](http://doresearch.stanford.edu/policies/research-policy-handbook/non-faculty-research-appointments/postdoctoral-scholars).
New Postdoc Admin Info

Tammy Wilson
Postdoctoral Services Manager
New Postdoc Admin Info

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

Tammy Wilson
Postdoctoral Services Manager
Winter Closure Web Forms Deadlines

• Postdoc web forms with a J-1 Visa:
  – Initial Appointment and DS-2019: December 8th
  – Reappointment and DS-2019 extension: December 11th
  – Change in start date or early termination and amendment of existing DS-2019: December 11th
Winter Closure Web Forms Deadlines

• Postdoc web forms with an H-1B visa:
  – Initial Appointments or Reappointment: November 9th
Winter Closure Web Forms Deadlines

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

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

Al Murray
Postdoctoral Services Manager
Multiple & Duplicate IDs

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

Al Murray
Postdoctoral Services Manager
Open Lab and In-Person Training

Open Lab and Classroom Postdoc Admin Training for Postdoc Policy and Web Forms:

– First Friday of every month, 8:00 am – 11:00 am
– No computers in the training rooms, please bring a laptop

• **1265 Welch Road, MSOB, x140**
  – December 1, 2017

• **LKSC 205/206**
  – January – August, 2018
Open Lab and In-Person Training

PeopleSoft Open Labs for GFS and GFS BI Reports have changed to 1:1 Zoom Sessions:

– Submit HelpSU to PeopleSoft GFS for remote session
  • Request Category: Administrative Applications
  Request Type: PeopleSoft GFS
  • Or click on: https://helpsu.stanford.edu/helpsu/3.0/helpsu-form?pcat=PS-GFS

Other Resources:

http://gfs.stanford.edu
http://gfs.stanford.edu/gfspostdocs.html
Mental Health Resources for Postdocs

Annelies Ransome
Associate Director for Operations

Office of Postdoctoral Affairs
Faculty Staff (and Postdocs)  

Help Center

- Did you know there are four locations?
  - Main Office, Kingscote Gardens, 419 Lagunita Drive
  - Stanford School of Medicine
  - SLAC
  - San Jose (Moorpark Ave., near Hwys 280 & 880)

- Services: Counseling, Facilitated Conversations, Workshops, and Discussion Groups.

- Also: Departmental Consultation and Training, and Departmental Retreat Facilitation.
Confidential Counseling – 24 hours per day, seven days per week

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

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

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

Questions?

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HelpSU.stanford.edu

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

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

Note: please do not email postdocaffairs@stanford.edu for urgent matters.