
GFS Entry & Policy for Postdoctoral Scholar Administrators

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Main Quad, Bldg 110, Room 112

2:00pm – 4:00pm

September 14, 2016

Agenda

- Getting Started
 - OPA & Department Responsibilities (prior to entry)
 - Navigation
 - Aid-Year Activation in GFS
 - Item-Type Requests for New PTAs
 - GFS System & Aid Entry
 - Policy & Procedures
 - Postdoc Compensation & Information Only Lines
 - Minimum Funding Guidelines
 - Late Entry & Retroactive changes
 - Postdoc Tuition
 - Tips & Miscellaneous
 - GFS Resources & Help
 - Appendix: Examples
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**OPA & Department
Responsibilities
(Prior to GFS Entry)**

Prior to GFS Entry

- OPA Tasks:
 - After OPA approval, OPA will load the record into PeopleSoft
 - Student ID number is created for *new* postdocs
 - Postdoc record is created in PeopleSoft
 - Benelagic record is created for postdoc insurance benefits after postdoc creates their SUNet ID
 - FYI: Postdoc Webforms Workflow Approval by OPA does not automatically create student record (must wait until record is loaded)
-

Prior to GFS Entry

- Department Tasks:
 - Aid-Year Activation in GFS
 - Item-Type Requests for New PTAs
 - GFS Entry of Salary, Stipend and Information-Only pay lines
 - Ensuring minimum required funding is being met
 - Collection of I-9 documents and forwarding to Payroll (and follow-up with Postdocs for missing I-9 documentation)
 - PTA set-up in Benelogic to pay for postdoc insurance
-

Navigation

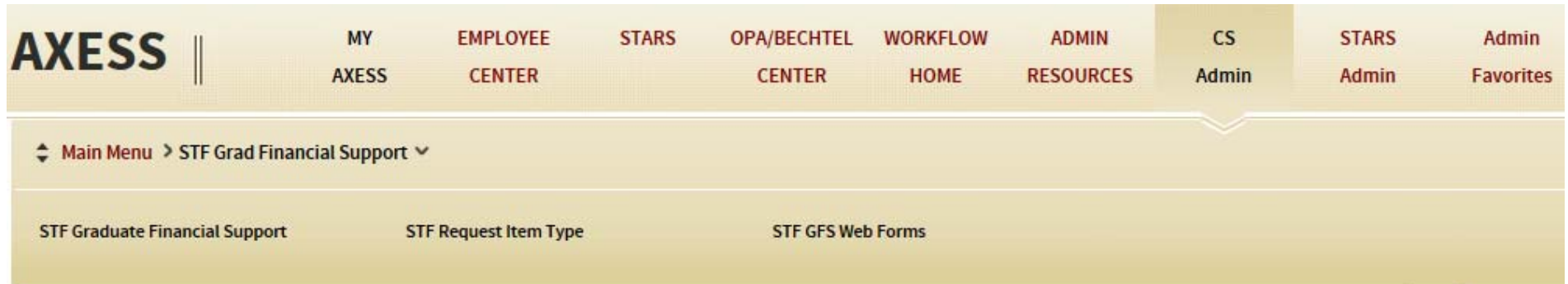
Navigation

- After logging into Axess, hover over CS Admin and click on STF Grad Financial Support

The screenshot shows the AXESS navigation interface. At the top, the AXESS logo is on the left, followed by a series of menu items: MY AXESS, EMPLOYEE CENTER, STARS, OPA/BECHTEL CENTER, WORKFLOW HOME, ADMIN RESOURCES, CS Admin (highlighted), STARS Admin, and Admin Favorites. Below this is a 'Main Menu' dropdown containing a grid of links. The link 'STF Grad Financial Support' is highlighted with a white background.

MY AXESS	EMPLOYEE CENTER	STARS	OPA/BECHTEL CENTER	WORKFLOW HOME	ADMIN RESOURCES	CS Admin	STARS Admin	Admin Favorites
Main Menu								
STF Web Forms	Student Admissions	Contributor Relations	Worklist					
Self Service	Records and Enrollment	Stanford Utilities	Reporting Tools					
STARS Menu	Curriculum Management	<u>STF Grad Financial Support</u>	PeopleTools					
Campus Community	Student Financials	Set Up SACR	My Personalizations					
Student Recruiting	Academic Advisement	PeopleSoft						

Navigation



- *STF Graduate Financial Support*: where most tasks are completed, including Aid Year Activation and GFS Entry
- *STF Request Item Type*: to create new item types for your PTAs (PTA/Exp type combination)
- *STF GFS Web Forms*: used to create off-cycle checks

Aid Year Activation

Aid Year Activation

- Postdoc must be Aid Year Activated by the department prior to entering pay lines into GFS

AXESS || MY AXESS EMPLOYEE CENTER STARS CENTER OPA/BECHTEL CENTER WORKFLOW HOME ADMIN RESOURCES CS Admin STARS Admin Admin Favorites

Main Menu > STF Grad Financial Support > STF Graduate Financial Support > Use ▼

[Aid Year Activation](#) Aid Entry Copied Aid By Template Id Disbursement Aid Seq Override

- Ensure the correct Home Department Mail Code is used

*Mail Code:

*Aid Year: Acad Org: Billing Career: GR Tuition Grp: GR_PD
Institution: STANF PHYSICS Billing Term: 1162 TAL Cat: PD

*Term	Short Description	*Acad Career	*Home Org	Descr	*TAL Category
1162	15-16 Aut	GR	PHYSICS	Physics	PD

Aid Year Activation

- The TAL category (“tuition group”) for postdocs is PD
 - Financial Aid Office batch Aid Year Activates all active postdocs in August for the upcoming GFS Aid Year
 - Batch Aid year Activation copies over the previous GFS year’s TAL category
 - Note: Postdocs who start their appointment after the August batch process will need to be manually Aid Year activated
 - Remember: The TAL category must be updated to PD for postdocs who were Stanford graduates (TGR, GRQTR) in the preceding graduation quarter
 - Mail code must also be updated as needed; this is the mail code used by Payroll for paper checks
-

GRPD Aid Year Activation

- Allows for the transition of a Stanford doctoral student to a Stanford postdoc in the middle of a quarter
- This allows the department to enter postdoc pay lines and graduate student pay in the same quarter
- Postdoc tuition is suppressed for that quarter; graduate student tuition is charged.

Should be used for **ONE QUARTER** only!

Corrections to this are messy.

GRPD Aid Year Activation

- Job Aid for GRPD Aid Year Activation can be found on the GFS Policy Website here:

<http://gfs.stanford.edu/gfsjobaids.html>

Item Type Requests

Item Typing PTAs

- New PTAs require that they be Item-Typed prior to use in GFS

The screenshot shows the AXESS system navigation menu. The menu items are: MY AXESS, EMPLOYEE CENTER, STARS, OPA/BECHTEL CENTER, WORKFLOW HOME, ADMIN RESOURCES, CS Admin, STARS Admin, and Admin Favorites. Below the menu is a breadcrumb trail: Main Menu > STF Grad Financial Support > STF Request Item Type > Use. A search bar contains the text 'Request Item Type Setup'.

- For postdoc GFS pay line entry, you may need:

Charge Priority	Description	Expenditure Type
RAF	Postdoc Salary	51210
RAFC	Postdoc Contingent Salary	51260
MONTHLY	Postdoc Stipend	57840
MONTHLY	Postdoc Travel/Supply Stipend (for taxable reimbursements)	57841

Item Typing PTAs

- Requests for Item Type Authority
 - Training is required: Complete 2 training videos
 - <https://web.stanford.edu/dept/as/PeopleSoft/Requirements.html>
 - Complete the GFS Item Type Requestor Completion Certificate
 - Found on the same website above
 - Set up in Authority Manager
 - Authority is granted by Student Financial Services
 - Item Type requests are processed nightly
 - Note: Item type requests cannot be completed until the PTA start date
-

GFS System Overview & Aid Entry

GFS System Overview

- GFS Aid Year runs from October 1 to the following September 30
 - This is one month off of the Fiscal Year (Sept-Aug)
 - Disbursement Plan for postdoc stipend and salary should always be NM-Payroll
 - Postdocs are not paid on a quarterly or semester basis
 - Helpful hint for determining Pay Org: One can look up the Item Type in GFS by clicking on the magnifying glass under Detail on the aid line and searching by PTA
-

GFS System Overview

- Postdoc Salary entries

- Paid 24 times a year, 2x monthly on the 7th and the 22nd
- Due date for approval is 5:00pm on the 15th and last day of the month

- Postdoc Stipend entries

- Paid 12 times a year, 1x monthly on the last day of the month
- Due date is 5 business days before the end of the month; schedule can be found here:

https://web.stanford.edu/group/fms/fingate/staff/payadmin/res_jobaid/postdoc_deadline.html

- GFS Salary & Stipend entries are not paid out retroactively if entered or approved late.
-

GFS System Overview

- Entering a Termination Date in GFS is not necessary if it is the same as the aid line End Date
 - BUT you must submit a Postdoc Termination Webform to end the postdoctoral appointment
 - The last day of payment is the End Date (or Termination Date, if entered)
-

GFS System Overview

Basic Steps for Entry:

1. Press the plus sign on the right hand side to add a new line.
2. Complete the funding data entry.
3. Click on Detail, then add PTA information and press OK.
4. Change the Status to C and click Save.

FLSHP Stipend
FLSHP Tuition
Assist Salary
Assist TAL
Work Panel

★

Aid Year: 2016 Institution: STANF

TAL Category	Total Amt	Autumn PD	Winter PD	Spring PD	Summer PD
All FLSHP Stipend	72948.66	18486.00	18486.00	18486.00	17490.66

Select All
Complete

Enter Fellowship Stipend

Entry
Quarterly/Notes
WF Transaction

Select	Aid Seq	Ident	*Pay Org	Disb Plan	Monthly Amount	Start Date	End Date	Termination Date	Stipend Total	Detail	Info only	Status	Description	Approval Status		
<input type="checkbox"/>	STP001	Berry Award	VAAA	NM-Payroll	4583.33	10/01/2015	08/31/2016		50416.63	Detail	<input type="checkbox"/>	C	Complete	Approved	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	STP002	EAFAST	VAAA	NM-Payroll	1578.67	10/01/2015	08/31/2016		17365.37	Detail	<input checked="" type="checkbox"/>	C	Complete	Approved	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	STP003	Berry Award	VAAA	NM-Payroll	5166.66	09/01/2016	09/30/2016		5166.66	Detail	<input type="checkbox"/>	C	Complete	Approved	<input type="button" value="+"/>	<input type="button" value="-"/>

Save
 Return to Search
 Previous in List
 Next in List
 Notify

GFS System – FLSHP Stipend Tab

Enter Fellowship Stipend														
Entry Quarterly/Notes WF Transaction														
Select	Aid Seq	Ident	*Pay Org	Disb Plan	Monthly Amount	Start Date	End Date	Termination Date	Stipend Total	Detail	Info only	Status	Description	Approval Status
<input type="checkbox"/>	STP001	Berry Award	VAAA	NM-Payroll	4583.33	10/01/2015	08/31/2016		50416.63	Detail	<input type="checkbox"/>	C	Complete	Approved
<input type="checkbox"/>	STP002	EAFAST	VAAA	NM-Payroll	1578.67	10/01/2015	08/31/2016		17365.37	Detail	<input checked="" type="checkbox"/>	C	Complete	Approved
<input type="checkbox"/>	STP003	Berry Award	VAAA	NM-Payroll	5166.66	09/01/2016	09/30/2016		5166.66	Detail	<input type="checkbox"/>	C	Complete	Approved

Enter:

- Ident: Description of the Funding Source
- Pay Org: Related to the PTA/Funding Source
- Disb Plan: ALWAYS NM-Payroll for Postdocs
- Monthly Amount: Annual Amount divided by 12
- Start Date: First day of payment
- End Date: Last day of payment (includes that day)

GFS System – Assist Salary Tab

Enter Assistantship Salary																		
Entry Quarterly/Notes WF Transaction																		
Aid Seq	Ident	*Pay Org	Assist Type	Disb Plan	Hours/week	Min Pay Period Amt	Pay Period Amt	Start Date	End Date	Termination Date	Assist Total	Detail	Calc TAL	Info only	Status	Description	Approval Status	
AST001	Kopito	PAAA	RAF	NM-Payroll	40.00		2083.34	10/05/2015	09/30/2016	06/30/2016	37121.33	Detail	Calc-TAL	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	Complete	Approved	<input type="checkbox"/> <input type="checkbox"/>
AST002	Kopito	PAAA	RAF	NM-Payroll	40.00		2083.34	07/01/2016	09/30/2016		12500.04	Detail	Calc-TAL	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	Complete	Approved	<input type="checkbox"/> <input type="checkbox"/>

Enter:

- Ident: Description of the Funding Source
- Pay Org: Related to the PTA/Funding Source
- Assist Type: RAF or RAFC only
- Disb Plan: ALWAYS NM-Payroll for Postdocs
- Hours/week: Based on a 40-hour work week
- Pay Period Amount: Annual Amount divided by 24
- Start Date: First day of payment
- End Date: Last day of payment (includes that day)

GFS System Overview

Differences between Assist Salary and FLSHP Stipend tabs:

1. Need to enter an Assist Type on the Salary tab.
 2. Need to enter the Hours per week on the Salary tab.
 3. Minimum Pay Period Amt is enforced on the Salary tab; it is based on minimums set per Stanford policy and hours entered
 4. A monthly amount is entered on the stipend tab while a pay period (half-monthly) amount is entered on the salary tab.
 5. Info-only lines should only be entered on the stipend tab.
-

GFS System – Detail Line

Term Distribution Find | View All First 1 of 1 Last

Term: 1168 15-16 Sum 07/01/2016 09/30/2016

Allocate Charge By
 Amount
 Date

Copy to all terms

Item Type Charging Detail

Detail Disbursement

Seq No	Start Date	End Date	Amount	Fund Src	Item Type	Project	Task	Award	Expend Type	Deptid (Task Org)	Charge Priority	Itm
1	07/01/2016	09/30/2016	12500.04		843900016036	1193031	200	PADML	51210	QAZR	RAF_SAL	itm

Item Type Charging Detail

Detail Disbursement

Seq No	Start Date	End Date	Amount	Fund S
1	07/01/2016	09/30/2016	12500.04	

OK Cancel

Look Up Item Type

Item Type: begins with

Award: begins with

Project: begins with

Task: begins with

Charge Priority List: begins with

Project Description: begins with

Task Owning Org: begins with

Pay Organization: begins with

Look Up Clear Cancel Basic Lookup

Seq No	Start Date	End Date	Amount	Fund S	Item Type	Project	Task	Award	Expend Type	Deptid (Task Org)	Charge Priority	Itm		
10										QAZR	RAF_SAL	itm	+	-

Enter:

- Item Type: The PTA/Exp Type combination
 - The magnifying glass will be available on entry to Look Up Item Type

Multiple Detail Lines

- Used when paying from multiple PTAs
 - Can be used for Salary payments only
 - NOTE: requires ALL financial approvers to approve before the aid line is *fully* approved
 - Personal preference
-

Using Multiple Detail Lines

- Multiple Detail lines (from a Single Aid line)
 - Pay Period Amount = (Total Aid / 24) and hours = 40

Aid Year: 2014 Aid Seq: AST002

Amt Total	Autumn	Winter	Spring	Summer
32495.36	12185.76	12185.76	8123.84	
Mochly-Rosen	Line Totals	12185.76	12185.76	8123.84

Term Distribution Find | View All First 1 of 4 Last

Term: 1142 13-14 Aut 10/01/2013 12/31/2013

Allocate Charge By: Amount Date Copy to all terms

Item Type Charging Detail

Seq No	Start Date	End Date	Amount	Fund Src	Item Type	Project	Task	Award	Expend Type	Deptid (Task Org)	Charge Priority	Itm
1	10/01/2013	12/31/2013	6092.88		873100033911	1018485	112	PADAZ	51210	XAEY	RAF_SAL	Itm
2	10/01/2013	12/31/2013	6092.88		873100001885	1062740	101	KAHO	51210	XAEY	RAF_SAL	Itm

OK Cancel

Terminating a Payline

Enter Fellowship Stipend															
Entry Quarterly/Notes WF Transaction															
Select	Aid Seg	Ident	*Pay Org	Disb Plan	Monthly Amount	Start Date	End Date	Termination Date	Stipend Total	Detail	Info only	Status	Description	Approval Status	
<input type="checkbox"/>	STP001	Berry Award	VAAA	NM-Payroll	4583.33	10/01/2015	08/31/2016		50416.63	Detail	<input type="checkbox"/>	C	Complete	Approved	+ -
<input type="checkbox"/>	STP002	EAFST	VAAA	NM-Payroll	1578.67	10/01/2015	08/31/2016		17365.37	Detail	<input checked="" type="checkbox"/>	C	Complete	Approved	+ -
<input type="checkbox"/>	STP003	Berry Award	VAAA	NM-Payroll	5166.66	09/01/2016	09/30/2016	09/15/2016	2583.33	Detail	<input type="checkbox"/>	P	Pending	Pending	+ -

To End a Payline on any day *earlier* than the End Date:

- Note: You will not be able to adjust a payline if it is still pending approval.
- 1. Change the Status from C to P, and tab out.
- 2. Enter the last date that the pay line should be active in the Termination Date field, and tab out.
- 3. Change the Status from P to C, and click Save to route for approval.

Terminating a postdoc?

- Be sure to end BOTH:
 - The academic appointment
 - Termination form in PS Webforms
 - And the GFS pay lines
 - Completed and approved by department administrators before the payroll deadline
 - The submission of one will not end the other!!!
-

Terminating a postdoc?

- Contact RMG (SOM) or OSR (University) if the postdoc leaving has grant/fellowship support through Stanford
 - Necessary because:
 - the award needs to be terminated
 - any final reports (technical or financial) must be completed within the sponsor's deadlines
-

Cancel or Terminate

- Was the aid line correct for a period of time, or is it completely incorrect?
 - Correct for a period of time = Terminate
 - Completely incorrect = Cancel
- Was the aid amount entered correct?
 - Correct for a period of time = Terminate
 - Completely incorrect = Cancel

Cancel or Terminate

- Example of when to terminate
 - Aid line for 10/1-9/30 for \$2250 per pay period
 - Increase to \$2500 per pay period as of 1/1
 - Example of when to cancel
 - Aid line for 10/1-9/30 for \$2250 per pay period
 - Should be \$2500 per pay period starting on 10/1
 - In both cases, must be marked as Complete and re-routed for Approval
-

Postdoc Compensation

Paying Postdoctoral Scholars

- Postdoctoral Scholars pay must be supported by:
 - Stanford grants and contracts,
 - Training grants,
 - School or departmental fellowship funds,
 - External fellowships,
 - Or any combination of these sources
 - Note: Postdocs cannot be self-funding
 - Funds entered in GFS will be either:
 - Salary -- **Assist Salary** Tab
 - Stipend/Outside Funding -- **FLSHP Stipend** Tab
 - The funding mechanism will usually dictate whether it needs to be paid out as salary or stipend
-

Key Distinctions

SALARY

- ❑ **ALLOWABLE** cost on research grants/ contracts
- ❑ Subject to tax withholding
- ❑ Fringe Benefits Rate (22.6% in 2016-17 for Postdoctoral Scholars whose salary accounts for at least 50% of total compensation)
- ❑ Receives W-2s
- ❑ Paid on the 7th and 22nd of the month

STIPEND

- ❑ **NOT ALLOWED** on research grants/ contracts
- ❑ **ALLOWABLE** on Training Grants and Fellowships
- ❑ Not permitted for postdocs on H-1 (employment) visas
- ❑ Receives a letter from Payroll at calendar year end for tax purposes
- ❑ Paid at the end of the month

Having to change from one to the other can be very painful.
Contact your department's grant manager to determine whether to pay funds as salary or stipend.

Compensation

1. Salary Only

(100% Salary, one PTA)

- Pay line entry is made on the Assist Salary tab
- Use Assist Type RAF; Hours =40

2. Salary Only from more than one source

(100% Salary, multiple PTAs)

- Either: enter one GFS pay line with multiple details lines
 - Or: Enter multiple pay lines
 - Use Assist Type RAF for all lines
 - All hours must add up to 40
-

Compensation (cont.)

3. Stipend Only or Outside Funded

(100% Stipend or Outside Funded)

- Pay line entry is made on the FLSHP Stipend tab
- Check the Info Only box for all funding that is paid directly to the postdoc (and not through Stanford)

4. Stipend/Outside with a Salary Supplement*

(Mix of Salary & Stipend/Outside)

- If the salary > stipend/outside
 - Salary line: use Assist Type RAF; hours calculated out of 40
- If the salary < stipend/outside
 - Salary line: use Assist Type RAFC; hours calculated out of 40

**This is a general rule of thumb.*

Fringe Benefits Rates

- The full Postdoc Benefit Rate (22.6% for FY17) is charged to salary entries with Assist Type RAF
 - Covers the institutional portion of postdoc insurance premiums (*when hours salary are 20 or more*)
- The Contingent Benefit Rate (8.4% for FY17) is charged to salary entries with Assist Type RAFC
 - Does not cover any postdoc benefits costs
- Fringe Benefits rates are not charged to stipend payments or Info-Only lines

Assistantship Type – RAF or RAFC – controls the benefit rate.

Example

Example:

Outside Fellowship paid directly to the Postdoc: **\$31,600/yr**

PI salary supplement: **\$20,000/yr**

Total Funding: \$51,600/yr

Hours salary calculated by: $(\$20,000 / \$51,600) * 40 = 15.5$
~ 15 hours (round down)

In GFS, the administrator enters:

- ❑ On *FLSHP Stipend* tab: the **\$31,600** stipend as an **INFO ONLY** line
 - ❑ Monthly amount is: $\$31,600 / 12 = \underline{\$2,633.33}$
- ❑ On *Assist Salary* tab: a **\$20,000** salary line with Assist Type **RAFC** and hours = **15**
 - ❑ Pay period amount is: $\$20,000 / 24 = \underline{\$833.33}$

Information-Only lines

- ARE REQUIRED
 - Use them when:
 - ❑ a Postdoc is funded by an outside source, and
 - ❑ the money is NOT being processed through Stanford
 - Why?
 - ❑ To show accurate record of Postdoc compensation and ensure compliance with minimum support levels
 - ❑ It is taken into account during periodic compensation audits
 - ❑ Info Only lines are included in GFS reports run in BI
 - ❑ Assists departments with budgeting
 - ❑ To plan for funding following the end of the external award
-

Information-Only lines

- How?
 - ❑ Enter as fellowship on FLSHP Stipend tab
 - ❑ Check the Info Only box
 - ❑ Will still need to click on the “Detail” button before completing
 - Does it still route for approval?
 - ❑ Yes, but only to Home Department Approver(s)
-

Entering an Information Only Line

Aid Year: 2014 Institution: STANF

TAL Category	Total Amt	Autumn PD	Winter PD	Spring PD	Summer PD
All FLSHP Stipend	67203.00	16650.75	17250.75	16650.75	16650.75

Select All

Complete

Enter Fellowship Stipend

Entry Quarterly/Notes WF Transaction

Select	Aid Seq	Ident	*Pay Org	Disb Plan	Monthly Amount	Start Date	End Date	Termination Date	Stipend Total	Detail	Info only	Status	Description	Approval Status		
<input type="checkbox"/>	STP001	VA	VAAA	NM-Payroll	5550.25	10/01/2013	09/30/2014		66603.00	Detail	<input checked="" type="checkbox"/>	C	Complete	Approved	+	-
<input type="checkbox"/>	STP002	VPGE MM	UMAA	NM-Payroll	600.00	03/01/2014	03/31/2014		600.00	Detail	<input type="checkbox"/>	C	Complete	Approved	+	-

Minimum Funding Guidelines

Funding Minimums

■ For Research Scholars:

- Departments must review their postdoc's funding in order to confirm that support on October 1st is at least at, or above, the appropriate university minimum
- OPA will conduct periodic salary audits, and Department Managers will be notified of cases of non-compliance

■ For Clinical Scholars:

- Departments must pay any postdoc with incidental or full patient responsibilities (including those who may be working on-call at the hospitals) at the appropriate hospital PGY scale on September 1st.
 - Contact the GME Office for the current rate sheet
-

Funding Minimums

Research Scholars

- New minimum effective 10/1/2016: \$51,600
 - Stanford Postdoc Salary Scales for both 2015-16 and 2016-17 can be found on the OPA website
<http://postdocs.stanford.edu/handbook/salary.html>
 - Postdocs paid at or around the minimum will require adjustments to their pay on October 1st of each year in accordance with that years' new minimums
 - Funding level is based on their total postdoctoral research experience as of October 1st
 - Increases can be made ahead of October 1st; pay must still meet the required minimum on the following October 1st for months experience as of that October 1st
-

Minimum Funding Example

A new appointment with no postdoctoral research prior to Stanford appointment:

- Appointment start date: June 1, 2016
 - 0 months experience → minimum \$50,000
 - On October 1, 2016 raise date:
 - 4 months experience → minimum \$51,600
 - Be sure to use the new 2016-17 rate sheet
 - Submit along with a PS Webforms Change form
 - Next required raise date: October 1, 2017
 - Postdoc will have 16 months experience
 - The PS Webforms system calculates required minimums on Recommendation and Change Forms
-

Late Entry & Retroactive Changes

Late GFS Entry (or Approval)

- Enter pay line using the originally intended GFS line information; complete and approve (required for Payroll to process)

Monthly Stipends

- Enter in GFS and submit a HelpSU to Payroll to request a Will Call Check

Assistantship Salary

- Enter in GFS and either submit a One Time Payment Form to Payroll to add the missing pay to the next regular paycheck OR complete a GFS Off-Cycle Check Webform to request a Will Call Check

Will call checks requested by 9:00am are generally available for pick-up after 3:15pm on the date requested for assistantship salary; after 3:15pm on Fridays for monthly stipends.

Requesting Repayment - If aid is decreased after the initial disbursement (Overpaid)

■ Monthly Stipends

- ❑ Enter in GFS and submit a HelpSU to Payroll for repayment amount
- ❑ Request check payment from the PostDoc

■ Assistantship Salary

- ❑ Enter in GFS and submit a HelpSU to Payroll for repayment amount
 - ❑ Request check payment from the PostDoc or submit a One Time Payment Form to Payroll to reduce the next regular paycheck(s)
-

Retroactive PTA Changes

- Monthly Stipends
 - Update GFS AND do an iJournal
- Assistantship Salary
 - Change GFS AND do Oracle Labor Distribution adjustment



Postdoc Tuition

Paying Postdoctoral Tuition Aid Year 2016 and After

- A tuition/registration fee of \$125 per quarter is charged to all postdocs for all quarters they are appointed
 - Effective the Autumn 2015 quarter and thereafter, tuition is paid on behalf of ALL postdocs by the Provost or SOM Dean, regardless of funding (salary, stipend, outside-funded).
 - As such, payment of quarterly postdoc tuition for terms 1162-on will be automated and no longer be entered in GFS.
-

Paying Postdoctoral Tuition

Degree-seeking Postdoctoral Scholars

- Postdocs with a dual appointment in a MS or PhD program follow alternative guidelines
 - Graduate-level tuition is charged instead of the \$125 postdoc fee for these terms. The \$125 charge is manually removed by the Registrar's Office.
 - Dual-career postdocs must complete the *Tuition Agreement for Students with Multiple Programs* form, obtain approval signatures from both departments and then OPA. OPA submits form to Registrar's Office.
 - http://studentaffairs.stanford.edu/sites/default/files/registrar/files/multiple_prog_agree.pdf
 - Aid Year Activation may need to be reviewed
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Tips & Miscellaneous

Postdoc Pay Day

- Postdocs should sign up for direct deposit in Axess
 - Salary pay statements can be viewed in Axess
 - Stipend pay statements *cannot* be viewed in Axess
 - Check mail code in Aid Year activation each year to ensure correctness
 - First payment will usually be cut as a check as opposed to direct deposit
 - Stipend paid postdocs may be sent a pay statement to the mail code entered in Aid Year Activation
-

Maternity & Medical Leaves

(reference RPH 10.3)

- Postdocs who go on leave due to maternity will typically receive 60% of their salary/stipend directly from the postdoc Disability carrier (Standard and/or Liberty)
- Departments/Faculty sponsors are responsible for the remaining 40% of the total salary/stipend
 - Salary payments
 - e.g. New hours = $(40 * .40) = 16$ **OR** New hours = $(24 * .40) = 9.6 \sim 9$
 - New Assist Type = RAFC
 - Stipend simply reduced to 40% of original amount
- Contact Sandra DeGaine, BEFORE you have a postdoc go on leave (postdocbenefits@stanford.edu)

GFS Workflow

- After Completing pay lines, they are routed for approval to the Home Department Approver and the Financial Approver under **Workflow Home**
- Note: this is different from the Postdoc Appointment workflow under OPA/Bechtel Center

The screenshot displays the AXESS system interface. At the top is a navigation bar with the AXESS logo and several menu items: MY AXESS, EMPLOYEE CENTER, STARS, OPA/BECHTEL CENTER, WORKFLOW HOME, ADMIN RESOURCES, CS Admin, STARS Admin, and Admin Favorites. Below the navigation bar, the page title is "Workflow Home". Underneath, there is a section titled "Workflow Home" containing three summary cards: "My Approvals" with a count of 0, "My Pending Requests" with a count of 83, and "My SuperUser List" with a count of 0. Below these cards, the text "My Approvals" is visible, indicating the start of a detailed view for that section.

Recalling a Payline

- To Recall a pay line (completed, but not yet approved)
 1. Go to Axess > Workflow Home > My Pending Requests
 2. Make sure GFS PAYMENT is selected in the Activity Filter
 3. Find line, scroll to right, and click on the **Recall** button

The screenshot shows the AXESS system interface. The top navigation bar includes 'AXESS' and several menu items: 'MY AXESS', 'EMPLOYEE CENTER', 'STARS', 'OPA/BECHTEL CENTER', 'WORKFLOW HOME' (circled in red), 'ADMIN RESOURCES', 'CS Admin', 'STARS Admin', and 'Admin Favorites'. Below the navigation bar, the 'Workflow Home' section is visible. It contains three tabs: 'My Approvals' (0), 'My Pending Requests' (83, circled in red), and 'My SuperUser List' (0). The 'My Pending Requests' section has an 'Activity Filter' dropdown set to 'GFS PAYMENT'. Below the filter is a table with the following columns: Transaction ID, Activity, Originator, Date Originated On, Date Received On, Aid Year, Disbursement Plan, Payline, Ident, Total Amount, Re-Call, and Comments. The table contains two rows of data. The first row has a 'RECALL' button circled in red. The second row also has a 'RECALL' button.

Transaction ID	Activity	Originator	Date Originated On	Date Received On	Aid Year	Disbursement Plan	Payline	Ident	Total Amount	Re-Call	Comments
01448587		Shannon Monahan	2015-12-14	2015-12-14	2015	Summer Quarter Only	TUT003	Tuition	125	RECALL	
01503410		Shannon	2016-09-02	2016-09-02	2016	Monthly -	STP002	Grant-	5000	RECALL	

- Pay line will show up in GFS as rejected, but you can then set it to Pending to make changes

GFS Roles

GFS Roles

- ❑ *GFS Entry Person*: enters GFS aid lines
 - ❑ *Home Department Approver*: approves for postdoc's appointed "home" department
 - ❑ *GFS Financial Approver*: approves for the PTA entered
 - The Home Department and GFS Financial Approvers should not be the same person
 - **Note**: these roles are different from the the Postdoc Webforms Entry and Approver roles
 - Contact OPA for Webforms training
-

(Fairly) New Functionality

■ Buttons!

- “Select All” and “Complete All” buttons added to Aid Entry tabs
 - Can be used on the FLSHP Stipend tab for postdocs

■ GFS Batch Aid Upload Tool

- Process developed to allow expert users to enter multiple GFS lines by uploading an excel spreadsheet rather than enter aid lines manually in GFS one by one
 - Job Aid can be found on the GFS Policy website here:
<http://gfs.stanford.edu/gfsjobaids.html>
-

GFS Resources & Help

Email Distribution Lists

- Self subscribe to the following lists via **mailman.stanford.edu**:
 - ❑ gradfinsupport@lists.stanford.edu
 - ❑ studadmin@lists.stanford.edu

 - To be added to the Postdoc Administrator List
 - ❑ SOM: Contact Alistair Murray (alistair@stanford.edu)
 - ❑ University: Contact Tammy Wilson (tjwilson@stanford.edu)
-

OBIEE

- Reports for GFS can be found in BI (bi.stanford.edu)
 - Getting access:
 - Access to reports is based on your PeopleSoft security access
 - If you have at least GFS Inquire role in PS, you have access to associated GFS reports in BI
 - Submitting HelpSU Tickets
 - Request Category = Administrative Applications
 - Request Type = Reporting - OBIEE
 - Include Report Title and Report Number in ticket
 - Include Mac or PC user
-

OBIEE Reports

■ **PS_GFS030 Monthly Postdoc Stipend Report**

- ❑ Process this report by month end date (for the desired pay period) and emplid, plan, account, or dept/school. Displays amount issued, check number, account, etc. Only includes Active postdocs.
- ❑ [Folder: Graduate Financial Support]

■ **PS_GFS013 Postdoc 50% Salary Report**

- ❑ Processes all postdocs at once. Displays postdocs who have employment of 50% or greater by month.
- ❑ [Folder: Graduate Financial Support]

■ **PS_GFS020 Postdoc Paylevels Report**

- ❑ Process by plan or dept/school, student status, and aid year. Provides GFS aid information for postdocs, including INFO ONLY lines. All postdocs included regardless of aid status.
 - ❑ [Folder: Graduate Financial Support]
-

OBIEE Reports (con't)

- **PS_GFS006 GFS Aid Disbursement Status**

- Process this report by a range of dates of disbursement and emplid, plan, account, or dept/school. Displays disbursement status (success/fail), amount issued, account, etc. Can include both Active and Terminated postdocs.
- [Folder: Graduate Financial Support]

- **PS_GFS009 Aid Sum for ALL Students**

- Processes all people in a selected Academic Program/Plan. Can also be used to determine whether the GFS entries and PTAs were entered properly.
 - [Folder: Graduate Financial Support]
-

GFS & Payroll Help

- HelpSU to GFS Help Desk
 - Request Category = Administrative Applications
 - Request Type = PeopleSoft GFS
 - Include the Emplid, Name, and Aid Sequence
 - PeopleSoft Training Center: <http://learnps.stanford.edu/>
 - GFS Policy Website: <http://gfs.stanford.edu/>
 - HelpSU to Payroll
 - Request Category = Central Office Issues
 - Request Type = Payroll Question
 - Include the Emplid, Name, and Aid Sequence
-

GFS Help

- In-Person GFS Help - Friday Open Labs

Users who would like personalized help with their GFS questions, or who would like to go through the online training in a lab setting with a knowledgeable user on hand, are encouraged to attend a drop-in lab:

Days: Every other Friday morning

Time: 9:00 - Noon

Where: Birch Modular, Lab B - 215 Panama

Questions

GFS Entry/Policy or Others?

Appendix: More Examples

GFS Examples

- Example 1: Stipend Only, one source

Postdoc awarded \$60,000 fellowship (stipend) from 6/1/15-5/31/16. Enter aid for GFS Aid Year 2016.

- Enter aid on FLSHP Stipend tab
- Monthly amount = \$5,000
- If outside-funded, check Info Only box and complete
- Else, click on Detail button and fill in
 - When entering detail, may need to click *Copy to all terms*
 - Will copy whole quarter amount to each quarter—if one quarter has only one month of pay, will need to manually adjust quarter amount
- Complete the aid line to route for approval

GFS Examples

■ Example 2: Stipend with Salary Supplement

Postdoc awarded \$60,000 fellowship (stipend) from 6/1/15-5/31/16. PI supplementing with \$12,000 salary for total pay of \$72,000. Enter aid for GFS Aid Year 2016.

- ❑ Enter salary payment on Assist Salary tab
- ❑ Pay period amount = \$500 and hours = $(12/60)*40 = 8$
- ❑ Assist Type = RAFC since < 20 hours
- ❑ Click on Detail button and fill in
 - When entering detail, may need to click *Copy to all terms* – adjust amount of term as necessary
- ❑ Calc TAL
- ❑ Complete the aid line to route for approval

GFS Examples

■ Example 3: Salary Only, two PTAs

Faculty Sponsor will pay postdoc a \$60,000 annual salary from two different sources (\$42,000 & \$18,000) for the period 11/1/15 – 7/31/16. Enter aid for GFS Aid Year 2016.

- ❑ Note the total is annualized, amount entered is prorated
- ❑ Enter salary payments on Assist Salary tab
- ❑ First pay line (\$42,000)
 - Pay period amount = \$1750 and hours = $(42/60)*40 = 28$
 - Assist Type = RAF since > 20
- ❑ Second pay line (\$18,000)
 - Pay period amount = \$750 and hours = $(18/60)*40 = 12$
 - Assist Type = RAF
 - ❑ This is still RAF since the TOTAL hours over all salary lines > 20

GFS Examples

- Example 3 (con't): Salary Only, two PTAs
 - Click on Detail button for each line and fill in
 - When entering detail, may need to click *Copy to all terms* and/or *View All* – adjust amount of term as necessary
 - Complete aid lines and route for Approval
-

GFS Payline Termination

- Example 4: Salary line changes

[Recall example 3] Faculty Sponsor wants to change the PTA for the second source of funding (\$18,000) beginning 12/1/15. Fix aid for GFS Aid Year 2016.

- Terminate AST002

- Set pay line to Pending
- Enter Termination Date of 11/30/15

- Add new Salary Payline with Start Date of 12/1/15

- Click on Detail to verify amounts – may need to click on *Copy to all terms and/or View All* to adjust the term amounts as necessary

- Complete/approve all aid lines