Demystifying Postdocs

Presenters:
Alistair Murray
Sarah Straight
Anh Hoang
Session Information

- Questions
  - Hold questions until end of each section
  - Use the note cards to record questions

- Handouts
Agenda

- Appointment Information
- Tips & Common Problems with Postdoc Entries
- Postdoc ReportMart Smarts
- Getting Answers to Questions
Appointment Information
Overall Appointment Process

- Web site has up-to-date forms: [http://postdocs.stanford.edu/admin/forms.html](http://postdocs.stanford.edu/admin/forms.html)
  - Do not use old forms
- Recommendation Sheet and Offer Letter should clearly state Department/Division to avoid problems with Aid Year activation
- Use checklist as reference
- Preferred visa is J1
Duration of Appointments – 4 years

- See Research Policy Handbook 9.4
  - Note: Several revisions effective 9/1/05 on Term of Appointment, Appointment Processing, and Levels and Sources of Support

- Initial appointment must be Full-Time, at least 9 months
Duration of Appointments

- Request for 5th year as exception
  - Must be approved by Asst. Dean of Postdoc Affairs
- Postdocs changing programs or doing research in a new field can be extended to 6 years total
- If extended absence goes beyond 90 days we usually expect a termination and reappointment
Term Activation

- OPA enters appointment into PeopleSoft Student Administration
- Registrar’s Office adds career if SU PhD
- Mid-quarter appointments of SU PhDs are term-activated as PD by Registrar’s Office for the following quarter
Aid Year Activation

- Departments Aid Year activate in GFS

Home > STF Grad Financial Support > STF Graduate Financial Support > Use > Aid Year Activation

Aid Year Activate
Rebecca Bloomwood-Brandon
ID: 05123456

*Mail Code: 5025

*Term | Short Description | *Acad Career | *Home Org | Descr | *TAL Category
--- | --- | --- | --- | --- | ---
1062 | 05-06 Aut | GR | CHEMENGR | Chemical Engineering | PD
Choosing the Correct Aid Types

- **Assistantship Salaries**
  - Entered on Assistantship Salary page
  - Assistantship Type Determines Expenditure Type

<table>
<thead>
<tr>
<th>Assistantship Type</th>
<th>Total Salaried FTE</th>
<th>Expenditure Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAF</td>
<td>&gt;=50%</td>
<td>51210</td>
</tr>
<tr>
<td>RAFc</td>
<td>&lt;50%</td>
<td>51260</td>
</tr>
</tbody>
</table>

- **Monthly Stipends**
  - Entered on Fellowship Stipend page
  - Choose Expenditure Type 57840 for Postdocs
Information About Termination of Appointments

- Termination of pay lines in GFS does not change PD status to terminated in SA
- If PD appointment has ended please remind PD Coordinator to submit Termination Form to OPA
- OPA and Registrar policy: Tuition is due if PD appointment falls into any day of an academic quarter
- Most problems occur when PD termination occurs at the start of a quarter
Appointment Information

Any Questions?
Tips & Common Problems with Postdoc Entries
Information Only Lines

- Why?
  - To show accurate record of postdoc compensation

- How?
  - Enter as fellowship (stipend and/or tuition)
  - Check the Info Only box

- Does it still route for approval?
  - Yes, but only to Home Department Approvers
Entering an Information Only Line
Tips for Tuition Allowance

- Always recalculate the TAL when changing a salary aid line
- Only use TAL Overrides when absolutely necessary
  - Recalculate instead of adjusting the amount
- Finish all entries before completing TAL lines
Using Multiple Detail Lines

- Divide the cost using the detail instead of multiple aid lines means fewer entries
- Fewer salary lines means fewer TAL lines
- Less guesswork & calculations
- Easier to troubleshoot
- When there’s a change, you only need to terminate and re-enter one aid line
Using Multiple Detail Lines

- Example using multiple aid lines

[Image of a detailed table with multiple entries for different aid types and payment details]
Using Multiple Detail Lines

- Example using multiple detail lines

![Image of a table and diagram showing the use of multiple detail lines in a financial aid application](image-url)
Using Multiple Detail Lines

- Example using multiple detail lines
  - Detail View with 3 PTAs
Using Multiple Detail Lines

- Example using multiple detail lines
  - Detail View with 2 PTAs
When the Detail Doesn’t Add Up

● Common Error Message:
  – Warning – Detail amounts do not add up to term amount for term xxxx.

● What does it mean?
  – The quarterly amounts in the detail do not match the quarterly amounts on the aid line

● What do I do?
  – Correct the detail to match the aid line
When the Detail Doesn’t Add Up
When the Detail Doesn’t Add Up
When the Detail Doesn’t Add Up

- Why did this happen?
  - Whenever the first quarter is less than the full term, the amount copied is incorrect

- What can I do to prevent it?
  - Instead of using the “Copy to All Terms”, use copy and paste to transfer the item type
  - Alternatively, “Copy to All Terms” and correct the amounts (as was demonstrated)
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
Cancel or Terminate

- Example of when to terminate
  - Aid line for 10/1-9/30 for $1750 per pay period
  - Increase to $2000 per pay period as of 1/1

- Example of when to cancel
  - Aid line for 10/1-9/30 for $1750 per pay period
  - Should be $2000 per pay period starting on 10/1

- In both cases, always recalculate the TAL
Tips & Common Problems with Postdoc Entries

Any Questions?
Postdoc Report Martian Smarts
Postdoc Reports in ReportMart

- All reports are located in the Graduate Financial Support Category in ReportMart (https://reportmart.stanford.edu).

- If you have access to the category, you can see all the reports within it. (You must have PeopleSoft GFS access to view ReportMart categories)
Useful Postdoc Reports

- **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.

- **GFS013 Postdoc 50% Salary Report**
  - Processes all postdocs at once. Displays postdocs who have employment of 50% or greater by month.

- **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.
Tip and Trick – Find Postdoc Population

- You can find postdoc information in most GFS reports by doing the following
  - Choose to process by Acad Plan
  - Select “Custom Values” on the Acad Plan Limit box
  - Change the operator to “Ends With”
  - Type in “-PD” in the value box and select the green checkmark
Tip and Trick – Find Postdoc Population
Postdoc Report
Mart Smarts

Any Questions?
Getting Answers to Questions
ReportMart Reminders

- Submitting HelpSU Tickets
  - Request Category = Administrative Applications
  - Request Type = ReportMart
  - Include Report Title and Report Number in ticket
  - Include Macintosh or PC user

- ReportMart1/Brio GFS Security
  - ReportMart1/Brio access for StuAdmin (incl. GFS) is based on PeopleSoft security access (RM1/Brio access is updated hourly)
GFS Reminders

- Submitting HelpSU Tickets
  - Request Category = Administrative Applications
  - Request Type = PeopleSoft GFS
  - Include the Emplid, Name, and Aid Sequence

- PeopleSoft Learning Center
  - http://peoplesoft.stanford.edu/learningcenter
OPA Reminders

- For general information check the website http://postdocs.stanford.edu/
- Send all questions to postdoc.services@stanford.edu
Thanks for Coming!

- Remember to turn in your notecards
  - If you want to be contacted, be sure to list your information on the card
- Please complete the evaluation form
- All materials will be posted on the web within the next week
  - http://gfs.stanford.edu/forum