

Demystifying Postdocs

Presenters:

Alistair Murray

Sarah Straight

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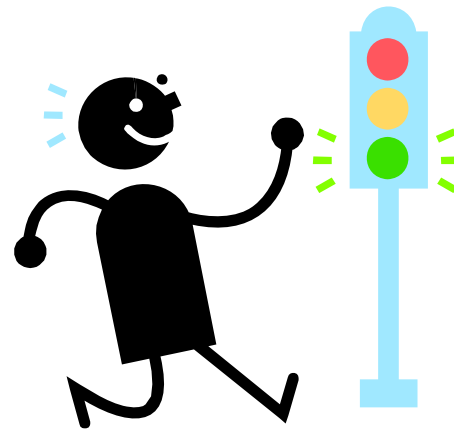
Session Information

- 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>
 - 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
 - <http://www.stanford.edu/dept/DoR/rph/9-4.html>
 - 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


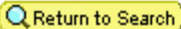
Aid Year Activate

Rebecca Bloomwood-Brandon ID: 05123456 

*Mail Code:

| View All First 1 of 2 Last | | | | | | | |
|----------------------------|-----------------------------------|-----------|-----------------|------|--------------|-------|--|
| *Aid Year: | <input type="text" value="2006"/> | Acad Org: | Billing Career: | GR | Tuition Grp: | GR_PD |  |
| Institution: | STANF | CHEMENGR | Billing Term: | 1064 | TAL Cat: | PD | |

| View All First 1 of 1 Last | | | | | | |
|----------------------------|-------------------|---------------------------------|---------------------------------------|----------------------|---------------------------------|---|
| *Term | Short Description | *Acad Career | *Home Org | Descr | *TAL Category | |
| 1062 | 05-06 Aut | <input type="text" value="GR"/> | <input type="text" value="CHEMENGR"/> | Chemical Engineering | <input type="text" value="PD"/> |   |

 Save  Return to Search

Choosing the Correct Aid Types

- Assistantship Salaries

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

| Assistantship Type | Total Salaried FTE | Expenditure Type |
|---------------------------|---------------------------|-------------------------|
| RAF | $\geq 50\%$ | 51210 |
| RAFc | $< 50\%$ | 51260 |

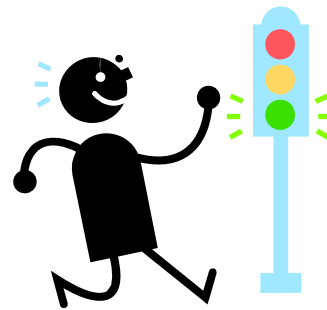
- Monthly Stipends

- 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

Home > STF Grad Financial Support > STF Graduate Financial Support > Use > Aid Entry

FLSHP Stipend | FLSHP Tuition | Assist Salary | Assist TAL | Work Panel

Jeff Corwin

ID: 05057256

Aid Year: 2006

Institution: STANF

| | Total Amt | Autumn | Winter | Spring | Summer |
|-------------------|-----------|--------|--------|--------|--------|
| TAL Category | | PD | PD | PD | PD |
| All FLSHP Tuition | 500.00 | 125.00 | 125.00 | 125.00 | 125.00 |

Enter Fellowship Tuition

Entry | Quarterly/Notes | WF Transaction

| Aid Seq | Ident | *Pay Org | Disb Plan | Total Tuition | Detail | Info only | Status | Description | Approval Status | | |
|---------|------------|----------|-----------|---------------|--------|-------------------------------------|--------|-------------|-----------------|--|--|
| TUT001 | XML Direct | VAAA | Qtr AWSS | 500.00 | Detail | <input checked="" type="checkbox"/> | C | Complete | Pending | | |

Save Return to Search

FLSHP Stipend | FLSHP Tuition | Assist Salary | Assist TAL | Work Panel

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

Home > STF Grad Financial Support > STF Graduate Financial Support > Use > Aid Entry [New Window](#)

[FLSHP Stipend](#) | [FLSHP Tuition](#) | [Assist Salary](#) | [Assist TAL](#) | [Work Panel](#)

Jeff Corwin ID: 05057256

Aid Year: 2006 Institution: STANF

| | Total Amt | Autumn | Winter | Spring | Summer |
|-------------------|-----------|---------|---------|---------|---------|
| TAL Category | | PD | PD | PD | PD |
| All Assist Salary | 36000.00 | 9000.00 | 9000.00 | 9000.00 | 9000.00 |

Alt Calendar [Refresh](#)

Mail Code: 2226

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 |
|---------|----------------|----------|-------------|------------|------------|--------------------|----------------|------------|------------|------------------|--------------|------------------------|--------------------------|
| AST001 | PTA 1 | VAAA | RAF | NM-Monthly | 20.00 | 750.000000 | 750.00 | 10/01/2005 | 09/30/2006 | 02/15/2006 | 6750.00 | Detail | Calc TAL |
| AST002 | PTA 2 | VAAA | RAF | NM-Monthly | 10.00 | 375.000000 | 375.00 | 10/01/2005 | 09/30/2006 | 02/15/2006 | 3375.00 | Detail | Calc TAL |
| AST003 | PTA 3 | VAAA | RAF | NM-Monthly | 10.00 | 375.000000 | 375.00 | 10/01/2005 | 09/30/2006 | 02/15/2006 | 3375.00 | Detail | Calc TAL |
| AST004 | New PTA 2 Line | VAAA | RAF | NM-Monthly | 20.00 | 750.000000 | 750.00 | 02/16/2006 | 09/30/2006 | | 11250.00 | Detail | Calc TAL |
| AST005 | New PTA 3 Line | VAAA | RAF | NM-Monthly | 20.00 | 750.000000 | 750.00 | 02/16/2006 | 09/30/2006 | | 11250.00 | Detail | Calc TAL |

[Save](#) | [Return to Search](#) | [Next in List](#) | [Previous in List](#)

[FLSHP Stipend](#) | [FLSHP Tuition](#) | [Assist Salary](#) | [Assist TAL](#) | [Work Panel](#)

Using Multiple Detail Lines

- Example using multiple detail lines

Home > STF Grad Financial Support > STF Graduate Financial Support > Use > Aid Entry [New Window](#)

[FLSHP Stipend](#) | [FLSHP Tuition](#) | [Assist Salary](#) | [Assist TAL](#) | [Work Panel](#)

Jeff Corwin ID: 05057256

Aid Year: 2006 Institution: STANF

| TAL Category | Total Amt | Autumn PD | Winter PD | Spring PD | Summer PD |
|-------------------|-----------|-----------|-----------|-----------|-----------|
| All Assist Salary | 36000.00 | 9000.00 | 9000.00 | 9000.00 | 9000.00 |

Alt Calendar Mail Code: 2226 [Refresh](#)

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 |
|---------|-----------|----------|-------------|------------|------------|--------------------|----------------|------------|------------|------------------|--------------|------------------------|--------------------------|
| AST001 | PTA 1,2,3 | VAAA | RAF | NM-Monthly | 40.00 | 1500.000000 | 1500.00 | 10/01/2005 | 09/30/2006 | 02/15/2006 | 13500.00 | Detail | Calc TAL |
| AST002 | PTA 2,3 | VAAA | RAF | NM-Monthly | 40.00 | 1500.000000 | 1500.00 | 02/16/2006 | 09/30/2006 | | 22500.00 | Detail | Calc TAL |

[Save](#) | [Return to Search](#) | [Next in List](#) | [Previous in List](#)

[FLSHP Stipend](#) | [FLSHP Tuition](#) | [Assist Salary](#) | [Assist TAL](#) | [Work Panel](#)

Using Multiple Detail Lines

- Example using multiple detail lines
 - Detail View with 3 PTAs

Home > [STF Grad Financial Support](#) > [STF Graduate Financial Support](#) > [Use](#) > **Aid Entry** [New Window](#)

Assistantship Detail

Corwin,Jeff ID: 05057256

Aid Year: 2006 Aid Seq: AST001

| | Amt Total | Autumn | Winter | Spring | Summer |
|-------------|-----------|---------|---------|---------|---------|
| | 36000.00 | 9000.00 | 9000.00 | 9000.00 | 9000.00 |
| PTA 1,2,3 | | | | | |
| Line Totals | | 9000.00 | 9000.00 | 9000.00 | 9000.00 |

Term Distribution View All First 1 of 4 Last

Term: 1062 05-06 Aut 10/01/2005 12/31/2005

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 | 10/01/2005 | 12/31/2005 | 4500.00 | NIH | 870400000506 | 1018431 | 100 | PAFJL | 51210 | VWLW | RAF_SAL | Itm | + | - |
| 2 | 10/01/2005 | 12/31/2005 | 2250.00 | NIH | 870100000406 | 1063053 | 100 | PAABO | 51210 | XBYE | RAF_SAL | Itm | + | - |
| 3 | 10/01/2005 | 12/31/2005 | 2250.00 | NIH | 872100000296 | 1018740 | 103 | PAFAV | 51210 | XBJC | RAF_SAL | Itm | + | - |

OK
Cancel

Using Multiple Detail Lines

- Example using multiple detail lines
 - Detail View with 2 PTAs

Home > STF Grad Financial Support > STF Graduate Financial Support > Use > Aid Entry

[New Window](#)

Assistantship Detail

Corwin,Jeff ID: 05057256
 Aid Year: 2006 Aid Seq: AST002
 Amt Total Autumn Winter Spring Summer
 22500.00 4500.00 9000.00 9000.00
 PTA 2,3 Line Totals 4500.00 9000.00 9000.00

Term Distribution

[View All](#) First 1 of 3 Last

Term: 1064 05-06 Wtr 01/01/2006 03/31/2006

Allocate Charge By

[Copy to all terms](#)

- Amount
- Date

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 | 02/16/2006 | 03/31/2006 | 2250.00 | NIH | 870100000406 | 1063053 | 100 | PAABO | 51210 | XBYE | RAF_SAL | Itm | + | - |
| 2 | 02/16/2006 | 03/31/2006 | 2250.00 | NIH | 872100000296 | 1018740 | 103 | PAFAV | 51210 | XBJC | RAF_SAL | Itm | + | - |

OK

Cancel

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

Home > STF Grad Financial Support > STF Graduate Financial Support > Use > Aid Entry [New Window](#)

Assistantship Detail

Corwin, Jeff ID: 05057256

Aid Year: 2006 Aid Seq: AST002

| Amt Total | Autumn | Winter | Spring | Summer |
|-------------|--------|---------|---------|---------|
| 22500.00 | | 4500.00 | 9000.00 | 9000.00 |
| Line Totals | | 4500.00 | 4500.00 | 4500.00 |

PTA 2,3

Term Distribution View All First ◀ 1 of 3 ▶ Last

Term: 1064 05-06 Wtr 01/01/2006 03/31/2006

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 | 02/16/2006 | 03/31/2006 | 2250.00 | NIH | 870100000406 | 1063053 | 100 | PAABO | 51210 | XBYE | RAF_SAL | itm | + | - |
| 2 | 02/16/2006 | 03/31/2006 | 2250.00 | NIH | 872100000296 | 1018740 | 103 | PAFAV | 51210 | XBJC | RAF_SAL | itm | + | - |

OK Cancel

When the Detail Doesn't Add Up

Home > STF Grad Financial Support > STF Graduate Financial Support > Use > Aid Entry

[New Window](#)

Assistantship Detail

Corwin,Jeff ID: 05057256

| Aid Year: | Aid Seq: | Amt Total | Autumn | Winter | Spring | Summer |
|-----------|----------|-------------|--------|---------|---------|---------|
| 2006 | AST002 | 22500.00 | | 4500.00 | 9000.00 | 9000.00 |
| PTA 2,3 | | Line Totals | | 4500.00 | 9000.00 | 4500.00 |

Term Distribution

[View All](#) [First](#) [2 of 3](#) [Last](#)

Term: 1066 05-06 Spr 04/01/2006 06/30/2006

Allocate Charge By

- Amount
 Date

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 | 04/01/2006 | 06/30/2006 | 4500.00 | NIH | 870100000406 | 1063053 | 100 | PAABO | 51210 | XBYE | RAF_SAL | itm | + | - |
| 2 | 04/01/2006 | 06/30/2006 | 4500.00 | NIH | 872100000296 | 1018740 | 103 | PAFAV | 51210 | XBJC | RAF_SAL | itm | + | - |

[OK](#) [Cancel](#)

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 ReportMart 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)

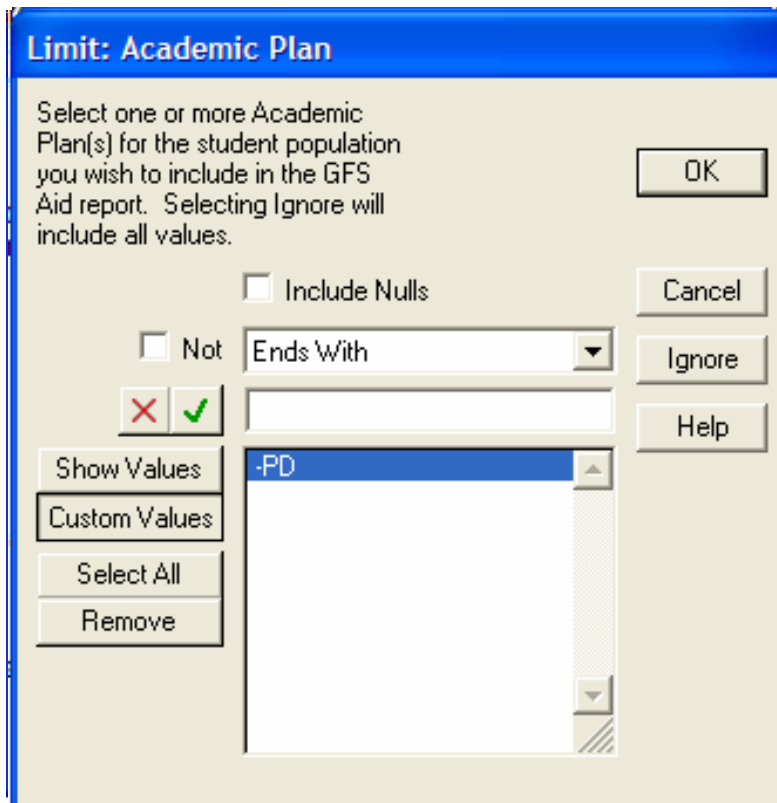
Useful Postdoc Reports

- 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 ReportMart Smarts



Any Questions?

Getting Answers to Questions



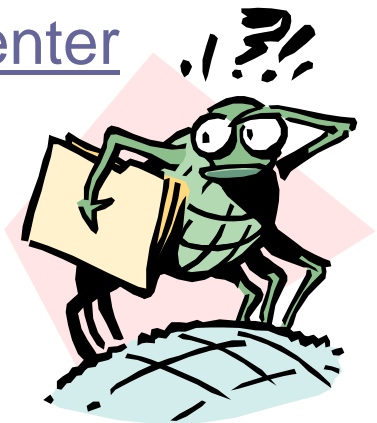
ReportMart Reminders



- 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>

