

Postdoc Aid Entry

A record must be created in PeopleSoft following the approval of the postdoc record from Postdoc Webforms before the GFS record will be active. For questions about a postdoc record or appointment, please contact the [Office of Postdoc Affairs](#) (OPA).

Postdoc GFS records have the following sections: Postdoc Info, Appointment Summary, All Aid Summary, and Aid Entry

Postdoc Info

Displays US Citizenship, I-9, and Direct Deposit information. Use the arrow to collapse or expand the section

POSTDOC INFO

EMPLID	NAME	ES	🗨	🔄
██████████	██████████			
US CITIZENSHIP STATUS	DIRECT DEPOSIT			
Citizen	✓			
I-9 DATE				
✓				

Appointment Summary

Place-holder fields for Appointment Start, Anticipated End, and Termination Date that will come from the postdoc appointment information (not yet available). The Scholar's Home Dept, GFS Mail Code, and Minimum Required Compensation are also displayed here.




APPOINTMENT SUMMARY

APPOINTMENT START	ANTICIPATED END	TERMINATION DATE
-	-	-
HOME DEPT	GFS MAIL CODE	MINIMUM REQUIRED COMPENSATION ⚠
██████████ ✎	██████████ ✎	62700

The Home Dept and GFS Mail Code fields are editable by clicking on the pencil icon (✎) next to the field, updating the field, and clicking on the check mark (✓) to save the changes. For postdocs who have switched programs, the Home Dept field will have a drop down menu of their current and previous programs to choose from. The selection of the Home Dept will populate the list of approvers with Home Dept Approvers for the selected program.




Next to the Minimum Required Compensation field, there is an icon to alert you to when the aid lines entered are meeting or not meeting the university's annual minimum required level of compensation. Currently, you will need to refresh the page in order for the update icon after funding has been entered.

There are three icons you may see on a record at any given time:

-  = Postdoc annual total is below the minimum required compensation, please review the aid lines. Please review.
-  = Either the Postdoc Yearly Amount or Annualized Amount is still below the minimum. Please review.
-  = Postdoc annual total is equal to or above the minimum required compensation.

The logic for these icons is looking at two things:

- Yearly Amount of compensation - total of pending approval and approved lines for the fiscal year, and
- Annualized Amount of compensation - projected annual income based on pending approval and approved lines as of the current date.

Min. Required Compensation Icon	Yearly Amount	Annualized Amount	Action Required
 Postdoc annual total is below the minimum required compensation. Please review.	Below min.	Below min.	Review the GFS aid lines and enter more funding to meet the minimum
 Either the Postdoc Yearly Amount or Annualized Amount is below the minimum. Please review.	Below min.	Equal to or above min.	The scholar's funding is at the minimum as of today, but that hasn't been the case all year. Please review to be sure no additional support needs to be entered.
	Equal to or above min.	Below min.	Any postdoc whose appointment began or ends mid-year may not have enough funding to meet the yearly amount and may have a yellow icon present for the entire aid year.
 Postdoc annual total is equal to or above the minimum required compensation.	Equal to or above min.	Equal to or above min.	For the aid lines entered, the yearly funding meets the minimum. In cases where the postdoc is receiving a higher annual rate than the university minimum, you will want to review the aid lines to ensure they are receiving the correct annual amount.

Once the aid year ends, the icons will update based at the yearly amount only. If the yearly amount is below the minimum, the icon will be red. If the yearly amount is at or above the minimum, the icon will be green.

All Aid Summary

Yearly Amount is the total amount of all pending approval and approved GFS lines entered for the Award Year.

ALL AID SUMMARY

STIPEND & SALARY SUPPORT	YEARLY AMOUNT	ANNUALIZED AMOUNT CALCULATED AS OF TODAY
SALARY	\$17,568.00	\$17,568.00
MONTHLY STIPEND	\$0.00	\$0.00
OUTSIDE FUNDING	\$39,430.36	\$0.00
TOTAL	\$56,998.36	\$17,568.00
OTHER SUPPORT	TOTAL AMT	
OTHER PAYMENTS	\$0.00	

Annualized Amount Calculated As Of Today is the projected annual salary amount for any pending approval and approved GFS aid lines as of the current date. If you thought you entered aid for the whole year, but did not, or the postdoc is only here part of the year, there will be a mismatch between the yearly and annual amounts.

ALL AID SUMMARY

STIPEND & SALARY SUPPORT	YEARLY AMOUNT	ANNUALIZED AMOUNT CALCULATED AS OF TODAY
SALARY	\$47,025.00	\$62,700.00
MONTHLY STIPEND	\$0.00	\$0.00
OUTSIDE FUNDING	\$0.00	\$0.00
TOTAL	\$47,025.00	\$62,700.00
OTHER SUPPORT	TOTAL AMT	
OTHER PAYMENTS	\$1,000.00	

Aid Entry

Aid for postdocs can be entered in four tabs: Salary, Stipend, Outside Funding, and Other Payments

Salary, Stipend, and Outside Funding aid entry requires annual amounts to be entered. Other Payments aid entry requires a monthly amount and only one PTA can be used per aid line. Item Types must be created for each PTA to be used with specific charge priorities and expenditures types in order to be used in each tab. If you are unable to find an item type using Item Type Look Up on an aid line, then either the PTA is not item typed for the correct charge priority and expenditure type or has not been item typed for use in GFS. Information about the training required for the GFS Item Type Requestor role can be found on the [GFS](#) website.

Salary

Postdoc salary (SAL) is issued semi-monthly on the 7th and 22nd of every month and GFS manages salary transactions for the current pay period only. Please see Fingate’s website for the [Payroll Schedule](#). For retroactive changes, please see the job aid [Correcting Postdoc Transactions in GFS](#).

There are two assistantship types for salary aid lines: Research Affiliate (RAF) and Research Affiliate Contingent (RAFC). When requesting a new item type for use in GFS for RAF or RAFC, please select Charge Priority = RAF_SAL and/or RAFC_SAL and the Expenditure Types will automatically populate for the respective Charge Priorities.

When entering postdoc salary, the selection of the assistantship type in GFS will have an impact on the postdoc’s benefits and it is important to keep the distinctions between RAF and RAFC in mind. Please contact the [Postdoc Benefits Office](#) with benefits questions.

- RAF assistantship type is used when the total number of hours for a time period is equal to or greater than 20 hrs. While you may enter multiple salary aid lines for a time period where each line is less than 20 hrs, the RAF assistantship type would need to be used if the total number of hours for those lines is equal to or greater than 20 hrs.

SALARY STIPEND OUTSIDE FUNDING OTHER PAYMENTS

SHOW CANCELLED LINES + Add | Save | Save & Submit | Cancel | Delete | Reset

AID SEQUENCE	IDENTIFIER	ASSIST TYPE	HRS/WK	PAY PERIOD AMT	ANNUAL AMT	START DATE	END DATE	TERMINATION DATE	PAY ORG	LINE STATUS	ACTIONS
▶ SAL001	RAF SAL	RAF	16	\$1,083.34	\$26,000.16	09/01/2020	12/31/2020		VAAA	Pending Approval	<input type="checkbox"/>
▶ SAL002	RAF SAL	RAF	10	\$708.34	\$17,000.16	09/01/2020	12/31/2020		VAAA	Pending Approval	<input type="checkbox"/>

- RAFC assistantship is used when the total number of hours for a time period is equal to or less than 19 hrs. When RAFC is selected, GFS will only provide hour options between the ranges of 1-19 in the Hrs Per Week drop down menu.

AID SEQUENCE	IDENTIFIER	ASSIST TYPE	HRS/WK	PAY PERIOD AMT	ANNUAL AMT	START DATE	END DATE	TERMINATION DATE	PAY ORG	LINE STATUS	ACTIONS
▼ SAL001	-	-	-	-	-	-	-	-	-	In-Progress	☐ ☰
AID SEQUENCE SAL001	IDENTIFIER RAFC SAL	ASSISTANTSHIP TYPE RAFC-PostD	HRS PER WEEK 19 - 47.5%	MIN ANNUAL AMOUNT	ANNUAL AMOUNT	START DATE MM/DD/YYYY	END DATE MM/DD/YYYY	TOTAL	PAY ORG	NOTES 250 Chars left	
<div style="text-align: right;"> + Add Save Save & Submit Cancel Delete Reset </div>											

Similar to RAF lines, you can enter multiple RAFC lines, but the total number of hours for all the combined RAFC lines in the same time period cannot exceed 19.

SAL Warning and Error Messages

Beginning with GFS aid year 2021, GFS will validate the total number of hours for a given time period and assistantship type selected to apply either an error or warning message if information is not meeting certain criteria. An error message will prevent you from saving or saving and submitting a SAL line because something about the line(s) needs to be corrected.

The warning message will appear in situations where the total hours is equal to or less than 19 hours and the assistantship type is RAF. You will want to review the SAL lines for the time period and determine if the assistantship type RAFC should be used or more RAF lines need to be entered to bring the total hours to 20 or more. The warning message will allow you to proceed with saving or submitting the line for approval.

Warning

You are about to do the following operations

- WARNING: The total number of hours for 9/1/2020-12/31/2020 is between 1-19 hours per week and assistantship type is RAF.

Please review aid lines and re-enter the aid using assistantship type RAFC or enter additional RAF aid lines to total 20 or more hours per week.

Adding SAL001

Ok

Cancel

The following error message will appear in situations where:

The total number of hours is 20 or more hours for a time period and assistantship type is RAFC.

Or

The total number of hours is 20 or more hours for a time period and there are SAL lines with a combination of assistantship type RAF and RAFC. Note: RAF and RAFC lines should not be used for the same pay period.

In either of these scenarios, you will want to review the SAL lines and decide whether RAFC is the correct assistantship type to use or RAF is correct, then make the necessary adjustments to the GFS lines.

Error

There are some errors in aid : SAL003

- The total number of hours for 9/1/2020-4/30/2021 is 20 or more hours per week and assistantship type RAFC is selected.

Please review aid lines.

RAF assistantship type is used when the total hours of work per week is equal to or greater than 20.

RAFC assistantship type is used when the total hours of work per week is equal to or less than 19.

Ok

There will be an error message when SAL lines exceed 40 hours of work per week.

Error

There are some errors in aid : SAL002

- The total number of hours for 9/1/2020-8/31/2021 exceeds 40 hours.

Ok

Stipend

Postdoc stipend (STP) is issued at the end of the month for the current and GFS manages stipend transactions for the current month only. Please see Fingate's website for [Postdoc Fellowship Deadlines](#). For retroactive changes, please see the job aid [Correcting Postdoc Transactions in GFS](#).

When requesting a new item type for use in the Stipend tab, the Charge Priority = Monthly and the Expenditure Type is 57840.

AID SEQUENCE	IDENTIFIER	ANNUAL AMT	MONTHLY AMT	START DATE	END DATE	TERMINATION DATE	PAY ORG	LINE STATUS	ACTIONS	
STP001	Stipend	\$31,700.04	\$2,641.67	09/01/2019	08/31/2020		VAAA	Draft	<input type="checkbox"/>	
AID SEQUENCE STP001	IDENTIFIER Stipend	ANNUAL AMOUNT 31700.04		START DATE 09/01/2019	END DATE 08/31/2020	TERMINATION DATE MM/DD/YYYY		TOTAL 31700.04		
PAY ORG VAAA-School of I										
DETAIL										
SEQ NO	AMOUNT	MONTHLY AMOUNT	TOTAL	ITEM TYPE	PTA	CHARGE PRIORITY	EXPEND TYPE	TASK ORG	FUND SRC	ACTIONS
1	31700.04	2641.67	31700.04	873100013718	1026121 - 101 - AABKS	MONTHLY	57840	VRZK	GEN_OB	

Outside Funding

The Outside Funding (OSF) tab is for funding that will be paid directly to the postdoc, i.e Info Only, and does not have a PTA. OSF aid lines do not have a Details section where you can enter a PTA and the list of approvers will only list the Home Dept. Approvers. The Pay Org must be manually selected.

If the funding is issued to the postdoc in a foreign currency, you would select "Yes" from the Foreign Currency field and the subsequent fields (Source Currency, Conv. Date, and Annual Amount in Foreign Currency) will be active. The OANDA link will take you to the OANDA site to calculate the currency conversion.

AID SEQUENCE	IDENTIFIER	ANNUAL AMT	START DATE	END DATE	TERMINATION DATE	LINE STATUS	ACTIONS
OSF001	Outside Funding	\$32,000.00	09/01/2019	08/31/2020		Approved	

ENTRY	AID SEQUENCE	IDENTIFIER	ANNUAL AMOUNT (IN USD)	MONTHLY AMT (IN USD)	START DATE	END DATE	TERMINATION DATE
	OSF001	Outside Funding	32000.00	2666.67	09/01/2019	08/31/2020	-

TOTAL	FOREIGN CURRENCY	SOURCE CURRENCY	CONV. DATE	ANNUAL AMOUNT (IN FOREIGN CURRENCY)	PAY ORG
32000.04	Yes	Germany - EUR	09/01/2019	29104.00	PAAA-Sch of Humanities and Sciences

OSF does not have Details section to enter PTA

NOTES

200 Chars left

WF TRANSACTIONS	TRANSACTION STATUS	UPDATED DTM
TRANSACTION ID 03847617	Approved	07/29/2020 12:17:22 PM

ORIGINATOR NAME	PHONE

APPROVERS	SEQ	ROLE	NAME	APPROVER ID	DEPARTMENT/ORG	APPROVER ACTION
	10	GFS HOME DEPT APPROVER				Peer Acted
	10	GFS HOME DEPT APPROVER				Peer Acted
	10	GFS HOME DEPT APPROVER				Approved

When editing a previously approved OSF line, the Identifier, Termination Date, and Notes fields will be editable.

Other Payments

The Other Payments (OTH) tab is support that will not count towards the postdoc's minimum funding. The aid line is entered as a monthly amount for the dates of payment. The total amount cannot be split across multiple PTAs within the Details, you would need to enter separate OTH lines for the same time period.

When requesting a new item type for use the OTH tab, the Charge Priority = Monthly and the Expenditure Type can be 57841 or 57860.

AID SEQUENCE	IDENTIFIER	TOTAL	MONTHLY AMOUNT	START DATE	END DATE	TERMINATION DATE	PAY ORG	LINE STATUS	ACTIONS
OTH001								In-Progress	

AID SEQUENCE	IDENTIFIER	MONTHLY AMOUNT	START DATE	END DATE	TOTAL	PAY ORG
OTH001	OTH	1000.00	09/01/2020	09/30/2020	1000.00	VAAA-School of

DETAIL

SEQ NO	TOTAL	MONTHLY AMOUNT	ITEM TYPE	PTA	CHARGE PRIORITY	EXPEND TYPE	TASK ORG	FUND_SRC
1	1000.00	1000.00	875000007025	1026318 - 100 - AABKS	MONTHLY	57841	XHSY	GEN_OB

Allocating Amount on Multiple PTAs

Within the Details area of a SAL or STP aid line, you may want to split the annual amount across multiple PTAs. You would enter the amount needed in the first detail line then add a new detail line.

AID SEQUENCE	IDENTIFIER	ANNUAL AMT	MONTHLY AMT	START DATE	END DATE	TERMINATION DATE	PAY ORG	LINE STATUS	ACTIONS
STP001	Stipend	\$31,700.04	\$2,641.67	09/01/2019	08/31/2020		VAAA	Draft	

AID SEQUENCE	IDENTIFIER	ANNUAL AMOUNT	START DATE	END DATE	TERMINATION DATE	TOTAL
STP001	Stipend	31700.04	09/01/2019	08/31/2020	MM/DD/YYYY	31700.04

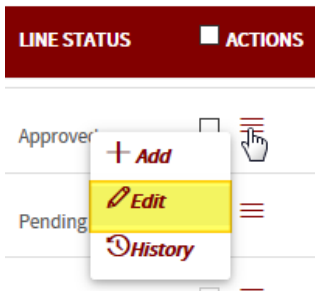
SEQ NO	AMOUNT	MONTHLY AMOUNT	TOTAL	ITEM TYPE	PTA	CHARGE PRIORITY	EXPEND TYPE	TASK ORG	FUND SRC	ACTIONS
1	15700.08	1308.34	15700.08	873100013718	1026121 - 101 - AABKS	MONTHLY	57840	VRZK	GEN_OB	<ul style="list-style-type: none"> + Add Delete

The amount for the subsequent line will be calculated for you.

SEQ NO	AMOUNT	MONTHLY AMOUNT	TOTAL	ITEM TYPE	PTA	CHARGE PRIORITY	EXPEND TYPE	TASK ORG	FUND SRC	ACTIONS
1	15700.08	1308.34	15700.08	873100013718	1026121 - 101 - AABKS	MONTHLY	57840	VRZK	GEN_OB	
2	15999.96	1333.33	15999.96	873100054908	1089727 - 101 - AABKS	MONTHLY	57840	VLSA	GEN_OB	

Editing GFS Lines

To edit a line, you will need to select Edit from the action options to the far right of the line. This will change the status of the line to In-Progress and from there certain fields will be editable within the aid line.



Termination date is used when you would like to end a line earlier than the end date used. Once you enter a termination date and save or save and submit the information, you may only adjust the date to one that is before the date used in the Termination Date field. If the incorrect termination date is entered, you will need to enter a new line for the dates needed.

When a line is incorrect for the entire time period, then the line would be cancelled. For example, the postdoc should have received stipend payment, but was paid salary. You would check the box for the line that needs to be cancelled and select Cancel.

Cancel | Delete | Reset

Y ORG | **LINE STATUS** | **ACTIONS**

VAA | Approved | ☰

Note: you do not want to enter a date equal to the start date to “cancel” a line because the postdoc may receive pay for one day.

Add Financial Approver

For new lines or when editing a previously approved line, you may need to make a one-time change to Fin Approver for one or more PTAs. GFS Financial Approver is an authority role granted in Authority Manager. Please consult with your department supervisor if a permanent change needs to be made.

10	GFS FIN APPROVER 875000001918				N/A	☰
10	GFS FIN APPROVER 875000001918				N/A	☰

+ Add | Save | Save & Submit | Cancel | Delete | Reset

New Fin Approver line is added. Then you would select the item type and the name of the Fin Approver options from the drop down menus. You will not be able to delete all Financial Approvers for an item type. There must be at least one financial approver for each item type used in the GFS aid line.

10	GFS FIN APPROVER 875000001918				N/A	☰
10	GFS FIN APPROVER 875000001918				N/A	☰
10	<input type="text"/>	<input type="text"/>	<input type="text"/>		N/A	☰

Need More Help?

If you need assistance with GFS, please submit a [GFS Service Request](#).