JOB AID FOR RECOMMENDATION FORM

Purpose: To generate an offer letter for the postdoctoral appointment

Confidentiality: Information entered in Postdoc Web Forms is part of Student Records. Confidential or sensitive information should not be entered into PD Web Forms.

Processing Timeline Requirements:

- For U.S. Citizens, Permanent Residents and F1 OPT visa holders:
    - 5 - 7 business days in advance of the requested appointment start date
- For J-1 Scholars:
    - For DS-2019 processing, a minimum of 8 weeks (9-10 weeks preferred) in advance of the requested appointment start date

In AXESS: OPA/Bechtel Center Tab > Postdoctoral Administrative Forms > Recommendation Form
OR: CS Admin > Campus Community > STF Postdoc > Postdoc Transactions > STF Postdoc Recommendation

1. **To create a new Recommendation Form, click "Add"**
    a. TRANSACTION DETAILS BOX
        i. Select Postdoc Data Form Field: Click the magnifying glass
            1. In the Look Up Box enter the postdoc surname in the Last Name Field, click "Look Up"
            2. From Search Results, click the name of the postdoc
            3. The Look Up Box closes and the Transaction Details Box is populated
        ii. Postdoctoral Request Type Field: Click on the drop down menu arrow and select "Clinical" or "Research," as appropriate
            1. Appointee Information, Department Applied, and Education Details Boxes are populated
        iii. Is this request for Department Transfer Field: Defaults to "No"
            1. If the postdoc is transferring to your department as a postdoc from another Stanford department, click the drop down arrow and select "yes"
            2. It is important to coordinate the transfer date with the transferring department to comply with visa policies, and ensure continuation of pay, benefits, and ID Card privileges, and avoid a gap in dates from the end date to the new start date
    b. TRANSACTION DETAILS LINKS
        i. Comparative Display of Biographic Data Link – mouse over to compare the postdoc's biographic data from the Information Sheet and DS-2019
        ii. Offer Letter Link – after you have entered all appointment information, click "Save" at the bottom of the form to review the Offer Letter
            1. Please review for punctuation and grammatical errors where text you entered in the Recommendation Form populates the Offer Letter – dates of appointment, funding source(s), and any additional text
        iii. Complete Information Sheet Link – review the postdoc's Information Sheet via this link
    c. ACADEMIC INFORMATION BOX
        i. Academic Career Field: Click the magnifying glass, click "Look Up," click the appropriate career (GR or MED)
        ii. Academic Program Field: Click the magnifying glass, click "Look Up," click on the appropriate Academic Program Description (must use Academic Program of the Faculty Sponsor)
        iii. Academic Plan Field: Click on the magnifying glass, click "Look Up," click on the Academic Program Plan Description (search results will be blank if Academic Program field is blank)
        iv. Academic Sub-Plan Field: For School of Medicine only - If the program has a sub-plan, repeat the same steps above to enter a sub-plan

v. Other Stanford Associations Field: Non-degree granting programs (Independent Labs, SLAC, BioDesign, etc., must use this field. Click on the magnifying glass, click “Look Up,” click the appropriate association for the postdoc.

d. APPOINTMENT INFORMATION BOX (“Request Type: Clinical” does not include all Fields noted below)
  i. Area of Research/Training - Position Description Field:
    1. Text entered here will complete the Offer Letter sentence that begins “During this appointment you will be involved in…”
    2. DO NOT ENTER A PERIOD at the end of your text; it is coded in the offer letter text
  ii. Appointment Start Date Field: Enter the requested appointment start date
  iii. Appointment End Date Field: Enter the requested appointment end date
  iv. Offer Letter Date Field: Enter the preferred date of issue of the offer letter
  v. Will the postdoc conduct research outside of Stanford campus Field: Defaults to “No”
    1. If changing to “Yes,” please enter the research location(s)
  vi. Will the postdoc work in a laboratory Field: Defaults to “No”
    1. If changing to “Yes,” complete the follow up question
  vii. Is this a joint appointment Instructor/Clinical Instructor Field: Defaults to “No”
    1. If changing to “Yes,” complete the follow up questions.
  viii. Research Experience since last conferral date Field: Months are pre-populated based on employment information provided in the postdoc’s Information Sheet
    1. KNOWN ISSUE – the pre-populated number of months may include pre-conferral employment data or other work experience that should be excluded
    2. CAREFULLY REVIEW the CV for the correct number of months of research experience and enter in the next field. For assistance with calculating research experience, see https://postdocs.stanford.edu/postdoctoral-administrators/how-quick-links/calculate-months-experience-research-non-clinical
  ix. Research Experience noted by department Field: Enter the correct number of months of research experience.
    1. After the Recommendation Form is approved by OPA, the research experience field CANNOT be corrected. Please be sure to enter the correct number of months. Minimum salary and the length of the postdoc appointment are impacted by incorrect months.
  x. If postdoc is an MD will he/she have patient contact Field: Defaults to “No”
    1. If changing to “yes” complete the Additional Information regarding Patient Contact Field
  xi. Additional Information regarding patient contact Field: Complete if postdoc will have patient contact
  xii. Additional details regarding this appointment to be included in the offer letter Field:
    1. Entered text creates a new paragraph in the Offer Letter (page 2, third from last paragraph)

e. FUNDING DETAILS BOX
  i. If no funds are paid from a particular salary type, LEAVE THAT FIELD BLANK
    1. Entering “None” or “N/A” will populate text in the funding sentence of the Offer Letter
  ii. Funding Description Field(s): In the appropriate New Salary, New Stipend, or New Outside Support Description fields:
    1. Provide the following information: US or Foreign; Agency/Fellowship Name; Dates of Funding
      i. Example 1: Foreign; Swiss Natl Funding Fllshp; 05/01/16-04/30/17
      ii. Example 2: US; John Doe Gift Funds; 10/01/16-09/30/17
  iii. Amount Fields: Enter the funding amount(s), ensuring that the total (or combined total) meets or exceeds the Required Salary listed
  iv. If funding data is entered in the Outside Support field, a copy of the outside funding letter must be uploaded to the Recommendation Form
    1. Outside funding letters must provide an award start and end date and a specific funding amount (salary range is not acceptable)

2. Funds must be noted in U.S. dollars, or please upload a currency conversion printout (Oanda.com provides currency conversion data)
3. Outside support must be entered in GFS as “Info Only” stipend lines
4. Periodic review of currency exchange rates are required to ensure funding does not fall below the required minimum. Outside support must be supplemented by department funds when exchange rate fluctuations result in funding falling below minimum.

f. VISA DETAILS BOX
   i. For international scholars, click the drop down arrow and select the appropriate visa type
g. SPONSOR INFORMATION BOX (ONLY for “Request Type: Clinical”)
   i. Post Graduate Year Field: Click the drop down arrow and select the appropriate PGY
   ii. Various Questions with Radio Buttons: Click the correct Radio Button to answer each question appropriate to the facts of the postdoctoral appointment
h. SUPPORTING DOCUMENTS BOX
   i. Browse/Upload Field: Upload missing or additional documents to the Recommendation Form
      1. There is no “Save” button
      2. The Document Name list will show uploaded documents (scroll down to see newly uploaded documents if the list is long)
      3. Required Supporting Documents:
         i. Doctoral diploma (English translation if issued in foreign language), OR
         ii. Letter of completion (issued by Registrar or equivalent, no department letters)
            1. Letter must confirm ALL degree requirements are COMPLETE, and the expected degree conferral date
         iii. Recent and complete Scholar CV
         iv. For International Scholars:
            1. Passport – copy of bio-demographic page
            2. For J-1 Visa status – Admin submits a DS-2019 request web form
            3. For F1 OPT status – Postdoc provides copy of EAD card or application
            4. For H-1B Visa status – Postdoc provides copy of most recent I-797
            5. For Permanent Residents – Postdoc provides a copy of green card
         v. Outside Funding Award letter (if data entered in Outside Support field)
            1. Foreign currency conversion printout (if award is stated in foreign currency)
         vi. Research Experience Calculator (required for Scholars with previous postdoctoral research experience or if any previous research experience is discounted)
i. PREVIEW AND CERTIFICATION BOX
   i. Click “Save” and then click “Preview Offer Letter”
   ii. Review the offer letter for proper punctuation and grammar, and consistency of text, in the paragraphs that contain text from data entered in the Recommendation Form fields
   iii. Click the Certification Box to confirm you have reviewed the Offer Letter text
j. Click “Submit” to route the form for approval

2. “HOLD” Recommendation Form while awaiting final Proof Of Degree

a. Begin the appointment process by sending the invite
b. After review, if all else is in order, approve the Information Sheet without proof of degree
c. Create and submit the Recommendation Form for Department Manager approval
d. After the postdoc accepts the online offer, HOLD your verification approval and submission to OPA until you have received and uploaded to the Recommendation Form, a copy of the proof of degree
e. Then submit to OPA for review and approval

3. **Uploading Additional Documents after the Recommendation Form is submitted**
    a. From AXESS, mouse over the OPA/Bechtel Center tab
    b. Click on Postdoc Administrative Forms
    c. Click Recommendation Form
    d. Enter the First and Last name of the postdoc in the respective search fields
    e. Click Search
    f. From the Search Results list, click the Transaction ID
    g. Scroll down to the Supporting Documents section of the recommendation form
    h. Click Browse for the document to be uploaded
    i. Click Upload to complete the upload
    j. There is no save button; if the upload worked the document title will show in the supporting document list. You may need to scroll down the list to see the last uploaded document.

4. **To search for a previously saved or submitted Recommendation Form**
    a. From Postdoctoral Administrative Forms, click the "Recommendation Form" radio button
    b. To search for all Recommendation Forms, click "Search"
    c. To search for a specific Recommendation Form:
        i. In the search criteria fields, enter the postdoc's First and Last Names, and click "Search"
        ii. From Search Results, click the Transaction ID of the Recommendation Form

After the Recommendation Form is submitted:

- The Recommendation Form routes to the Role 2 approver (if your department has one), or to the Role 3 Chair/Proxy/DFA department manager for approval.
- After Role 3 approves the form, the postdoc receives an email notification with instructions to return to the secure portal to view and accept the offer letter.
- The Administrator receives an email notification to return to workflow to verify the Recommendation Form; however, **the Approve button on the form is not enabled until *after* the postdoc accepts the offer letter.**
- After the Administrator verifies the Recommendation Form, the form routes to OPA for review and approval.

To search for the Student ID:

Be aware that it takes 24-48 hours (or longer during high volume times) for the Student ID to be created after appointment approval. If you do not have access to PeopleSoft or GFS to search for the student ID#, please use this method:

1. From AXESS, click the Postdoc Administrative Forms tab
2. Click the Change Transactions button
3. Click "Add"
4. Click the magnifying glass to the right of the Student ID field
5. In the Look Up box, enter the postdoc's first and last names
6. Click "Look Up"
7. The student ID is displayed in the Search Results
8. Write down (or copy and paste) the ID number
9. Exit the look up box; exit the change form without saving or submitting.