



Postdoctoral Scholars Workshop for EDB Administrators

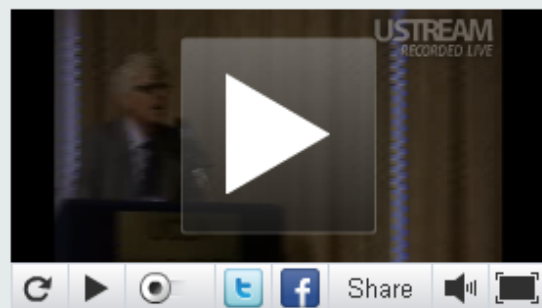


The Office of Postdoctoral and Visiting Scholar Services (OPVSS)

OPVSS is responsible for the authorization and administration of all Postdoctoral Scholars and Visiting Scholars at UCLA, policy development and compliance, advisement and counseling, and training and education.

Visit us at <http://www.grad.ucla.edu/postdocs.html>

Postdoctoral Scholars

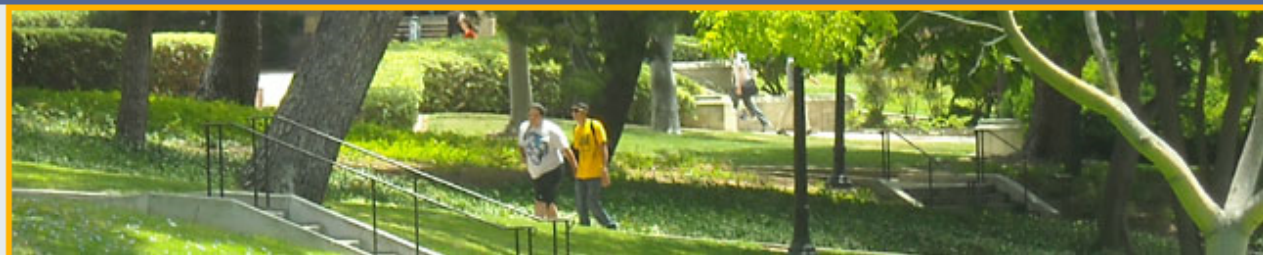


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OPVSS Listservs

For Administrators

- <http://lists.ucla.edu/cgi-bin/mailman/listinfo/postdocadmin>
 - postdocadmin@lists.ucla.edu
 - Provides updates and other relevant information to departmental staff regarding postdoctoral scholar services.

For Postdoctoral Scholars

- <http://lists.ucla.edu/cgi-bin/mailman/listinfo/uclapostdoc-l>
 - uclapostdoc@lists.ucla.edu
 - Provides administrative and scholarly information to UCLA postdoctoral scholars.

OPVSS Contacts



Ross Shideler, Ph.D.
Associate Dean, Graduate Division
rshideler@gdnet.ucla.edu
(310) 825-0843

Among his decanal duties, Associate Dean Shideler is responsible for all postdoctoral and visiting scholar appointments as well as all exceptions to the labor contract or university policy respectively.



April de Stefano, Ph.D.
Director, Academic Services
adestefano@gdnet.ucla.edu
(310) 825-0636

Dr. de Stefano's responsibilities include the development and management of all aspects of postdoctoral and visiting scholar appointments. She also works closely with campus administration regarding interpretation of the postdoctoral scholar labor contract, university policy, and outside funding agency regulations.

Contact April for questions regarding:

- Postdoctoral scholar union labor contract matters
- Issues related to mentor-postdoctoral scholar relations
- Issues related to departmental-scholar relations
- Benefits including health insurance
- Regulations regarding postdoctoral fellowship programs

OPVSS Contacts continued



Mike Flaxman, MPA
Coordinator
mflaxman@gdnet.ucla.edu
(310) 825-4247

Mr. Flaxman's responsibilities include counseling prospective and current postdoctoral & visiting scholars and sponsoring departments on University policies and procedures, labor contract provisions, degree requirements, and benefits enrollment.

Contact Mike for questions regarding:

- EDB appointment of postdoctoral scholars
- Postdoctoral and visiting scholars policy, procedures, and exceptions
- Postdoctoral scholar union labor contract matters
- Benefits including health insurance



Brittany Howell
Administrative Specialist
bhowell@gdnet.ucla.edu
(310) 825-4688

Ms. Howell is the first point of contact for general questions about postdoctoral and visiting scholars. She assists in the appointment of postdoctoral and visiting scholars and also administers other services for all postdoctoral and visiting scholars as outlined below.

Contact Brittany for questions regarding:

- Forms and other paperwork for appointment of postdoctoral and visiting scholars
- Housing, loan deferment, relocation expenses and certificates of completion for postdoctoral scholars
- BruinCards for Visiting Scholars
- Certificates of completion

Effective, May 16, 2011, please send all Form 10s directly to **Jenny Tang**, Graduate Student Support Administrative Analyst, in 1228 Murphy Hall. For question regarding fellowship award transmittals, please contact Ms. Tang at jtang@gdnet.ucla.edu or (310) 206-9791.



Postdoctoral Scholar Union Contract

http://atyourservice.ucop.edu/employees/policies_employee_labor_relations/collective_bargaining_units/post_docs/agreement.html

- Ratified Aug. 12, 2010 between UC and UAW.
- 5-year contract for title codes 3252, 3253 and 3254.
- One time, across-the-board salary/stipend increase for postdoctoral scholars with active appointments on 9/1/2010.
- Implementation of experience-based salary/stipend steps started June 1, 2011.



3252: PDS – EMPLOYEE

An appointment is made to the title “Postdoctoral Scholar Employee” when:

1. The agency funding the salary requires or permits the appointee to be an employee of the University.
- OR
2. Whenever General Funds, Opportunity Funds or other University discretionary funds are used to support the position.



3253: PDS – FELLOW

An appointment is made in the title “Postdoctoral Scholar – Fellow” when:

1. The postdoctoral scholar has been awarded a fellowship or traineeship for postdoctoral study by an extramural agency, and;
2. The fellowship or traineeship is paid through a University account through the Graduate Division (i.e., Form 10).



3254: PDS – PAID DIRECT

An appointment is made to the title “Postdoctoral Scholar – Paid Direct” when:

1. The postdoctoral scholar has been awarded a fellowship or traineeship for postdoctoral study by an extramural agency, and;
2. The agency pays the fellowship or traineeship directly to the postdoctoral scholar rather than through the University.
3. Proof of Funding must be provided with Appointment packet.



Salary/Stipend Rates

- Effective June 1, 2011, implementation of experience-based minima (“NIH salary steps”).
- Revised salary/stipend scale, effective February 1, 2012.
- **Minimum of \$39,264 for new appointments effective on or after February 1, 2012.**
- Please note that the salary on the appointment form must match the salary listed in EDB and meet the minimum.



Experience-Base Salary/Stipend Minima

| Experience Level | Annual | Monthly |
|----------------------------|---------------|----------------|
| • Level 0 (0 - 11 months) | \$39,264 | \$3,272.00 |
| • Level 1 (12 - 23 months) | \$41,364 | \$3,447.00 |
| • Level 2 (24 - 35 months) | \$44,340 | \$3,695.00 |
| • Level 3 (36 - 47 months) | \$46,092 | \$3,841.00 |
| • Level 4 (48 - 59 months) | \$47,820 | \$3,985.00 |
| • Level 5 (60 - 71 months) | \$49,884 | \$4,157.00 |



New Appointment on or after 2/1/12

UCLA wants to hire a Postdoctoral Scholar who has worked at University of Michigan for two years. What rate is the minimum starting pay at UCLA on February 1, 2012?

- A. \$39,264
- B. \$44,340

B. \$44,340



Reappointment Below Scale (for dates between 2/1/12-5/31/12)

UCLA has a Postdoctoral Scholar making \$38,522. She has been there for three years. What salary should she earn upon reappointment on February 20, 2012?

- A. No change.
- B. \$46,092
- C. 3% more or \$44,340.

C. 3% more or \$44,340



Reappointment Above Scale (for dates between 2/1/12-5/31/12)

A UCLA Postdoctoral Scholar is making \$49,000 per year with one year of experience. What should her pay rate be upon reappointment on March 1, 2012?

A. Nothing, above the minimum experience level.

B. 2% increase = \$49,980.

C. Decrease pay back to \$39,756.

B. 2% increase = \$49,980



Appointment Requirements

- Appointments must be exactly twelve-month increments (unless requesting an exception for a reappointment for less than one year).
- Appointments end the day before the start date (unless by exception).
- The total duration of an individual's postdoctoral service may not exceed five years, including postdoctoral service at other institutions. Under unusual circumstances the University may grant an exception to this limit, not to exceed a sixth year.
- Postdoctoral Scholars are full-time FLSA-exempt professional appointees (100% time). The workweek is normally at least 40 hours, with the emphasis placed on meeting the responsibilities assigned to the position, on making progress toward their professional goals, and on demonstrating their research and creative capabilities, rather than on working a specified number of hours.



Appointment Percentage

- Appointments to the Postdoctoral Scholar titles are full-time (100%), based on the expectation that the Postdoctoral Scholar will be fully involved in scholarly pursuits.
- When a Postdoctoral Scholar additionally holds a University teaching appointment, or other University position, the percent-time of the PDS appointment normally will be reduced so that the sum of the percent times of the two appointments equals 100%.



Exceptions to Policy

- Exceptions are considered for the appointment period, percentage, and term limit upon written request of the appointee and concurrence of the mentor.
- Exceptions should be addressed to Associate Dean Ross Shideler and submitted to the Office of Postdoctoral & Visiting Scholar Services (1255 Murphy; MC 142801).
- Exception Request Form
<http://www.grad.ucla.edu/gss/postdoc/pdexception.pdf>



Appointment Types

- New
- Reappointment- below NIH Scale
- Reappointment- at NIH Scale
- Reappointment- at or above NIH Scale
- Revision (switch in title codes, mid-appointment increase)

Appointment Guidelines and Forms for Postdoctoral Scholars

- <http://www.grad.ucla.edu/gss/postdoc/frmsintro.htm>

Appointment Processing Checklist

- <http://www.grad.ucla.edu/gss/postdoc/pdcklist.pdf>



New Appointment Criteria

- All new appointments must be at least at the minima of the appropriate NIH experience based rate.
- The appropriate NIH experience based rate is determined by years of experience as a Postdoctoral Scholar at any institution.
- Use the months of service to determine the minimum experience based rate.



New Appointment, experienced Postdoc from another institution

Paresh has been a Postdoc for three years at Ohio State University. UCLA hires him beginning March 1, 2012.

- He must be given an initial one year appointment from March 1, 2012 – February 28, 2013.
- He must be paid a minimum of \$46,092 (experience based level 3)



New Appointment, Experienced UC Postdoc going to a new lab at UCLA

Veronica has worked at UC Irvine in a Chemistry lab for one year (hire date: October 1, 2010). Her PI is retiring when the current grant funding has concluded. She is reappointed from October 1, 2011 to January 31, 2012 at UC Irvine. Then she secures a new Postdoc position at UCLA beginning February 1, 2012.

- She must be given an initial one year appointment from February 1, 2012 – January 31, 2013.
- She must be paid a minimum of \$41,364 (experience based level 1) because she has 15 months of previous postdoctoral research experience.



NEW Appointment Required Paperwork

- Offer Letter
 - Template at <http://www.grad.ucla.edu/ucla/gss/pdsappmnttemp.pdf>
- Appointment Form
- Personal Data Form (statement of objective now included)
- Curriculum Vitae (CV)
- Proof of Doctoral Degree
- Proof of Insurance (if not enrolled through UCLA)
- Proof of Funding (if scholar is a Paid-Direct)
- Union Deduction Form
- <http://www.grad.ucla.edu/gss/postdoc/frmsintro.htm#new>
- <http://www.grad.ucla.edu/gss/postdoc/pdcklist.pdf>



Postdoctoral Scholar Health Benefits

- The UC Postdoctoral Scholar Benefits Plan (PSBP) is a comprehensive package of benefits designed to closely match the benefits offered through the UC Faculty/Staff plan.
- Coverage includes medical, dental, vision, life, AD&D, workers' comp., short-term disability, and voluntary long-term disability coverage.
- Complete information is available online at:
<http://www.garnett-powers.com/postdoc/>



Policy on Departmental Coverage

Effective January 1, 2012, Postdoctoral Scholars who choose to enroll in the HMO or PPO medical, dental, and vision plans will have their insurance premiums covered in full by the sponsoring department.

- Excludes the Postdoctoral Scholars' required monthly premium contributions.
- Coverage includes Postdoctoral Scholar and eligible family members.
- UCLA is the last UC campus to adopt this practice.



Exceptions

Effective January 1, 2012, the cost-sharing mechanism will only be allowable when a Postdoctoral Fellow (3253) or Postdoctoral Paid-Direct (3254):

- Has a funding source that designates or allows health benefits to be charged to her/his research or institutional allowance
- The funding source is insufficient to cover the complete costs of the HMO or PPO premiums.

In these instances the sponsoring department will be responsible for covering the remaining cost and the Postdoctoral Scholar and department will need to complete the cost-sharing form.



Coverage Requirements for All Postdoctoral Scholars

The following benefits require 100% University contribution on behalf of ALL Postdoctoral Scholars (employees, fellows and paid-directs):

- Workers Compensation
- Life Insurance, including AD&D
- Short-term Disability

The Postdoctoral Scholar **CANNOT** be required to personally pay any of these costs.



PSBP Benefits Contributions

Starting in January 2012, Postdoctoral Scholars will be required to contribute to the monthly **HMO** premiums in the following amounts:

2012: 2% of monthly health care premiums for the Postdoctoral Scholar and the Postdoctoral Scholar/child(ren); and 3% for Postdoctoral Scholar/partner, and/or Postdoctoral Scholar/family.

Monthly contributions for the **PPO** medical plan will remain at \$30 for a single postdoc, \$60 for postdoc + spouse, \$60 for postdoc + child(ren) and \$90 for family coverage.



PSBP Benefits Contributions (continued)

| Coverage Level | HMO | | | PPO | | |
|-----------------------------------|------------|----------------------|-------------------------------------|------------|----------------------|-------------------------------------|
| | UC | Postdoctoral Scholar | Postdoctoral Scholar % Contribution | UC | Postdoctoral Scholar | Postdoctoral Scholar % Contribution |
| Postdoctoral Scholar | \$385.71 | \$7.87 | 2% | \$368.14 | \$30.00 | 8% |
| Postdoctoral Scholar + Partner | \$916.30 | \$28.34 | 3% | \$895.54 | \$60.00 | 7% |
| Postdoctoral Scholar + Child(ren) | \$675.02 | \$13.78 | 2% | \$636.76 | \$60.00 | 9% |
| Postdoctoral Scholar Family | \$1,164.45 | \$36.01 | 3% | \$1,124.36 | \$90.00 | 8% |



EUCl: PSBP Charging

- For 3253 and 3254 categories, charge the health insurance premiums through EUCl to specify the amount in percentages charged to departmental FAUs.
- The 3253 or 3254 payment towards the monthly premium is identified on the “[Department & Postdoctoral Scholar Contributions Sheet](#),” (upon exception only, effective January 1, 2012)
- When the scholar pays the monthly bill, the departmental FAU is credited.

Note: PPO deductions, voluntary long-terms disability coverage and instances where the 3253 or 3254 has agreed to pay a portion of their own premiums, will be set up centrally through the CHR benefits office.



EUCI: PSBP Charging (continued)

Upon reviewing your monthly expense distribution reports (PPP5302) you may notice that some benefit expenses are by-passing the EUCI screen and only charging the FAU associated with the REG appointment. To correct this, departments will need to provide the corrected information (crediting the wrong FAU and debiting the correct FAU) on the following excel spreadsheet template:

| Location | Account | Cost Center | Fund | Project | Sub Code | Object Code | Source | Description | Reference | Debit | Credit |
|--|------------------------------------|--|--|---|------------------------------------|--|-------------------|---|--|---|--|
| Enter 4 for UCLA. Contact Payroll Services for UCOP or UC Merced | Enter the six digit account number | Enter the 2 digit cost center that corresponds to the account number entered in column B. This field may be left blank if there is no cost center corresponding to the account number. | Enter the 5 digit fund number that corresponds to the account number entered in column B | A project code can be entered if required. Leave blank if no project. | Enter 06 (two digits) for benefits | Enter the 4 digit object code that begins with an 8. This can be found in PPP5302 subtotals. | Can be left blank | Enter employee's name. This is what will show up as a description on the General Ledger | Enter employee's UID number (9 digits) | Enter the amount to be debited (complete only on line to be debited). | Enter the line to be credited (complete only on line to be credited) |
| EXAMPLE OF CORRECT ENTRY | | | | | | | | | | | |
| Location | Account | Cost Center | Fund | Project | Sub Code | Object Code | Source | Description | Reference | Debit | Credit |
| 4 | 4099999 | 1B | 12345 | aco1 | 06 | 8293 | | PSBP- Joe bruin | 123456789 | | 340.00 |
| 4 | 4123456 | | 54321 | | 06 | 8293 | | PSBP- Joe bruin | 123456789 | 340.00 | |

These requests should be sent to Arnel Concepcion (aconcepcion@finance.ucla.edu) in Payroll Services, who will make the adjustments through the journal web process so that the expenses will appear correctly on your general ledgers.



PSBP: NIH T32/F32 Allowable Charges

- NIH T32 & F32 grants will not permit charging of the Life/AD&D and Worker's comp assessments of the PSBP.
- For these grants, identify another fund source to journal these expenses regularly (monthly or quarterly).
- Example: a trainee with self-only HMO coverage will cost \$320.57, of which \$33.04 (or 8.5%) needs to be charged to an unrestricted source.



Health Benefits Contacts

<http://www.grad.ucla.edu/gss/postdoc/pdhlthbnft.htm>

Garnett-Powers & Associates

- www.garnett-powers.com/postdoc
- Toll-free Customer Service: **1-800-254-1758**
- E-mail : PSBP@garnett-powers.com (attention Lisa Walters)

PSBP Benefits Processing (CHR Benefits at UCLA)

- Oletha Brown, Manager: 794-8579



Exercise 1



REAPPOINTMENT Process

Reappointments (Extension)

- 1. Enter reappointment dates and any other changes into EDB
- 2. Submit the following documents to the Graduate Division:
 - Offer Letter (use template)
 - Appointment Form
 - Union Deduction Form (only if Postdoc is switching title codes)
 - Proof of Insurance (if not enrolled through UCLA)
 - Proof of Funding (if scholar is a Paid-Direct)
 - Annual Evaluation

<http://www.grad.ucla.edu/gss/postdoc/frmsintro.htm#extensions>

<http://www.grad.ucla.edu/gss/postdoc/pdcklist.pdf>



Reappointments – at or above the NIH Experience-based Level

- Upon reappointment, place the Postdoctoral Scholar at the appropriate experience based level.
- If above the appropriate experience based level, a minimum of 2% is required for reappointments.



Reappointments below NIH Experience-Based Level (for all Postdocs appointed prior to 6/1/11)

- From June 1, 2011, to May 31, 2013, upon reappointment, the Postdoctoral Scholar shall receive a 3% increase.
- From June 1, 2013 to May 31, 2014, upon reappointment, the Postdoctoral Scholar shall receive a 3.5% increase.
- Since the Postdoctoral Scholar is below scale, the University is not obligated to increase the pay to the actual step based on experience.



Reappointment Below Scale (for dates between 2/1/12-5/31/12)

Vladimir has been at UCLA for three years (36 months), with the current appointment ending April 15, 2012. His salary is \$46,000. The PI wants to reappoint.

- Vladimir can be given a salary upon reappointment of as little as \$46,092 (\$92 increase) because he only has to move to the next salary level.
- Nothing prohibits the PI from providing higher compensation.



Reappointment Below Scale (for dates between 2/1/12-5/31/12)

Norma's first appointment ends on May 20, 2012 at UCLA. She was appointed at the then minimum salary of \$37,740.

- She must receive at least \$38,872, which is a 3% increase.
 - Nothing prohibits the PI from providing higher compensation.



Reappointments, on or after June 1, 2012

- Beginning June 1, 2011, once a Postdoctoral Scholar is appointed at or above the appropriate experience rate, all future reappointments must be to at least the appropriate experience based salary/stipend rate.
- If a Postdoctoral Scholar's salary/stipend amount is above the appropriate experience level on reappointment, the Postdoctoral Scholar shall receive at least a two percent (2%) salary increase.
- Appointments may only be below scale for Postdocs who were appointed prior to June 1, 2011. A three percent (3%) increase will only be applicable in these instances.



Reappointment (on scale), on or after 6/1/12

Alyson was appointed on 7/1/11 at the previous minimum of \$38,496. She had no previous postdoctoral experience. Her faculty mentor wants to reappoint Alyson on 7/1/12. What salary will Alyson need to be reappointed at?

- A. 40,548
- B. \$39,651 (3% increase)
- C. \$41,364

C. \$41,364- Alyson must be reappointed to *Experience Level 1*, which is the appropriate experience based salary/stipend rate.



Reappointment (above scale), on or after 6/1/12

Mats was appointed on January 31, 2012 at \$42,000. He had no previous postdoctoral experience. His faculty mentor wants to reappoint Mats on January 31, 2013. What salary will Mats need to be reappointed at?

- A. Nothing, above the minimum experience level.
- B. 2% increase = \$42,840.
- C. Decrease pay back to \$41,364.

B. \$42,840- Mats must receive a two (2%) percent increase upon reappointment as his previous salary was above the appropriate experience level.



Reappointment (above scale), on or after 6/1/12

Paris was appointed on August 15, 2011 at \$41,000. She had no previous postdoctoral experience. Her faculty mentor wants to reappoint Paris on August 15, 2013. What salary will Paris need to be reappointed at?

- A. 2% increase = \$41,718.
- B. \$41,364

B. \$41,364- Paris can be given a salary upon reappointment of as little as \$41,364 (\$364 increase) because she only has to move to the next salary level. Nothing prohibits the PI from providing higher compensation.



Reappointment (below scale), on or after 6/1/12

Jessie was first appointed at UCLA (with no previous experience) on June 15, 2010. Her current salary is \$38,522 and her faculty mentor wants to reappoint her for a third year, on June 15, 2012. What salary will Jessie need to be reappointed at?

- A. At least a 3% increase = \$39,677.
- B. \$44,340

A. \$39,677- Jessie is required to receive at least a 3% increase upon reappointment. Since Jessie was hired prior to June 1, 2011, she does not need to move up to the appropriate experience based salary/stipend rate. .



Exercise 2



SEPARATION (“End”) Process

1. Enter Separation information in EDB
2. Send Exception Request Form to Mike Flaxman mflaxman@grad.ucla.edu for **all early** terminations.
3. Submit the following documents:
 - Recommendation for Issuance of Certificate of Postdoctoral Study form (if desired by the postdoctoral scholar).
 - Form located at <http://www.grad.ucla.edu/ucla/gss/pdcertreq.pdf>



Supplemental Compensation

- Supplemental compensation is supplemental to the regular, guaranteed compensation. It is additional and temporary.
- The supplemental income should always be listed in the Offer Letter when you are aware of it at the time of the offer. It should be described in writing to the Postdoctoral Scholar as temporary additional compensation when it is offered during her/his appointment.
- The supplement is listed on a separate appointment line in EDB for the sake of clarity.



Supplemental Compensation (continued)

Example:

A Postdoctoral Scholar is appointed at 95% time as a 3253-Fellow and is receiving a supplement as a 3252- Employee at 5% appointment

EDB should be as follows:

- Appointment Line: 95% 3253- Fellow (indicating the “permanent” funding)
- Appointment Line: 5% 3252- Employee (indicating the “temporary” supplement funding)



Mid-Appointment Salary Increases

- A Postdoctoral Scholar can receive a salary increase at any point during their appointment period.
- When a Postdoctoral Scholar receives a mid-appointment salary increase, submit the following:
 - Revised appointment form
 - Evaluation- for salary increases above 15% (for merit purposes)
- **Note:** The Postdoctoral Scholar will be required to receive an experience-based increase upon reappointment, even if they received an increase during their current appointment period.



Time Off

- Allowed 24 personal days off during the year
- Personal Time Off must be requested & approved in advance
- Supervisor cannot unreasonably deny time off
 - Work considerations, especially directly related to research, prevail
 - UC may not unreasonably deny a religious holiday request
- Eligible for 12 sick days during the year
- “Use-it-or-lose-it” form of time off; sick days “carry forward”
- Departments track time internally; will not accrue in EDB



Time Off (continued)

When a Postdoctoral Scholar switches into a different title code (such as the project scientist, researcher series) sick leave carries forward into their new position. As sick leave for a Postdoctoral Scholar is not accrued in the PPS system, the departmental administrator would need to manually input the Postdoctoral Scholar's sick leave accrual by the time the person will begin their position in the different title code.

For more information on Postdoctoral Scholar sick leave and personal time off, visit

<http://www.grad.ucla.edu/gss/postdoc/pdleave.htm>.



Other Leaves

- Childbearing, Parental and Family Medical: as per union contract
- Holidays: official holidays for postdoctoral scholars are those administrative holidays published in the University calendar.
- Military: as per union contract
- Jury: postdoctoral scholars are eligible for jury duty leave.



Tax Information

- PDS Benefits are tax reportable income when a PDS does **not** have an employee title (3252)
 - Nonresidents for tax purposes:
 - Are billed for the taxes on this income.
 - Income is reported at year end on Form 1042-S
 - US Residents for Tax Purposes:
 - Are expected to report income on their own.
- Correct PDS appointments must be entered into EDB in a timely manner as it affects the calculation of taxable income for fellows and paid directs.
- **Contact Mike Sattin at msattin@finance.ucla.edu or x75774 with tax and Glacier questions.**



Tax Information (continued)

How Postdoctoral Scholars enter the Relationship and Income Type on GLACIER.

3252: Postdoc Employees:

- RELATIONSHIP WITH UCLA: Employee: Postdoctoral Scholar
- INCOME TYPE: Employee: Wages/Salary/Income

3253: Postdoc Fellow:

- RELATIONSHIP WITH UCLA: Scholarship/Fellowship: Postdoctoral Scholar/Visiting Scholar
- INCOME TYPE: Scholarship/Fellowship: Other

3254: Postdoc Paid Direct

- RELATIONSHIP WITH UCLA: Scholarship/Fellowship: Postdoctoral Scholar/Visiting Scholar
- INCOME TYPE: Scholarship/Fellowship: Taxable Post doc Benefits

In cases where a PDS have more than one appointment title code, s/he enters both employee and scholarship/fellowship income types. **Contact Mike Sattin with all tax-related questions.**



Tax Information cont'd

| Postdoctoral Scholar | Taxability of Benefits | Benefits Paid by the University Subject to Withholding for: | | Benefits Paid by the University Reported on: | |
|--|------------------------|---|-----------|--|------------|
| | | Federal Tax | State Tax | Federal Form | State Form |
| Employee – Citizen (1) | No | No | No | --- | --- |
| Employee – Nonresident Alien (2) | No | No | No | --- | --- |
| Fellow - Citizen | Yes | No | No | --- | --- |
| Fellow – Nonresident Alien (3)(4) | Yes | Yes | No | 1042-S | 592-B |
| Paid Direct – Citizen | Yes | No | No | --- | --- |
| Paid Direct – Nonresident Alien (3)(4) | Yes | Yes | No | 1042-S | 592-B |

(1) Imputed income due to the coverage of a domestic partner will be reported on the Form W-2 of the Postdoctoral Employee.

(2) Imputed income due to the coverage of a domestic partner will be reported on the Form 1042-S of a nonresident alien Postdoctoral Employee who is eligible to claim a tax treaty benefit; if not, the income is reported on a Form W-2.

(3) Imputed income due to the coverage of a domestic partner will be reported on the Form 1042-S and Form 592-B of a nonresident alien Postdoctoral Fellow or Paid Direct.

(4) If the individual is from a country that has entered into a tax treaty with the U.S. and that treaty contains an exclusion for fellowship payments, the individual is not subject to tax on the benefits, including domestic partner benefits, and no income tax withholding is required. The amount of the benefits is reported, however, on Form 1042-S and Form 592-B.



Additional Postdoctoral Services

- [Postdoctoral Scholar Orientations](#)
- Administrators workshop
- Deferment of student loans
- Certificates of Completion
- Assistance with housing requests
- Chancellor's Award for Postdoctoral Research & Postdoctoral Scholars Reception
- Online directory of active appointments



Online Directory

<http://www.grad.ucla.edu/gss/postdocdir/default.asp>

- Only scholars with active appointment dates are included in this directory.
- Searchable by Department or by Name
- The information listed includes:

Name

E-mail

Department

Field of Study

Appointment End Date

PhD/MD Institution

Faculty Sponsor

Prospective Students * Current Students * Postdoctoral Scholars * Visiting Scholars * Faculty & Staff

Search & Site Map Search

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Postdoctoral Scholars Directory

Only scholars with active appointment dates are included in this directory.

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Administrators Workshop

Register here:

<http://www.grad.ucla.edu/gss/postdoc/pdvsworkshop.htm>

- Reviews important policy & procedures
- Provides helpful information for completing postdoctoral scholar appointment paperwork
- Shows how to complete an award transmittal form (Form 10)
- Ample time for individual questions and answers



Online Instructions & Resources for Administrators

<http://www.grad.ucla.edu/gss/postdoc/pdvsworkshop.htm>

Includes PowerPoints and PDFs of all presentations related to processing postdoctoral scholar appointments.