



VISITING SCHOLAR & POSTDOC AFFAIRS

UNIVERSITY OF CALIFORNIA, BERKELEY

Visiting Scholar & Postdoc Affairs

Mission and Goals

Foster a robust research community

Enhance the research experience at Berkeley

Convey policy issues to the attention of senior campus officials

Provide the research community with the delivery of services, benefits and privileges

Offer professional and career development opportunities

Support career interests of the postdoctoral scholars

Oversee and support the Berkeley Postdoctoral Association and other initiatives



Postdoc Definition & Requirements

Must possess a Ph.D. or foreign equivalent prior to starting appointment. Only a letter of completion from the university registrar's office or copy of degree is accepted.

May not have more than five years of postdoctoral experience, including that from other institutions.

Must have an institutional source of funding, e.g., fellowship, traineeship, or equivalent external support.

Must pursue a program of research and training under the direction of a faculty member, with approval of an academic department or organized research unit (ORU) and registration with the VSPA Program.

May not have been employed as an assistant professor, associate professor, or professor.

Initial appointments must be at least one year in duration. Reappointments may be for less than a year under certain circumstances (see PX Contract).

Postdoc Job Codes

Postdoctoral Scholar – Employee (Job Code 3252)

An appointment is made in 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.

Postdoctoral Scholar – Fellow (Job Code 3253)

An appointment is made in the title “Postdoctoral Scholar – Fellow” when the Postdoctoral Scholar has been awarded a fellowship or traineeship for postdoctoral study by an extramural agency and the fellowship or traineeship is paid through a University account.

Postdoctoral Scholar – Paid Direct (Job Code 3254)

An appointment is made in the title “Postdoctoral Scholar – Paid Direct” when the Postdoctoral Scholar has been awarded a fellowship or traineeship for postdoctoral study by an extramural agency and the agency pays the fellowship or traineeship directly to the Postdoctoral Scholar, rather than through the University. Such appointments shall have a “without-salary” status.

Postdoctoral Scholars may be assigned to more than one postdoctoral scholar title concurrently depending on University and extramural funding agency requirements.

Visiting Scholar Definition & Requirements



Individuals whose primary purpose is to conduct independent research

Minimum degree requirement of PhD or equivalent

Minimum appointment of 1 month, appointments granted up to only 1 year at a time

Can stay for up to 2 years maximum

Units may provide a stipend of up to \$10,000 per year which can be used to cover living expenses, travel costs, and incidental research expenses, but not as a form of salary compensation.

Visiting Student Researcher Definition & Requirements

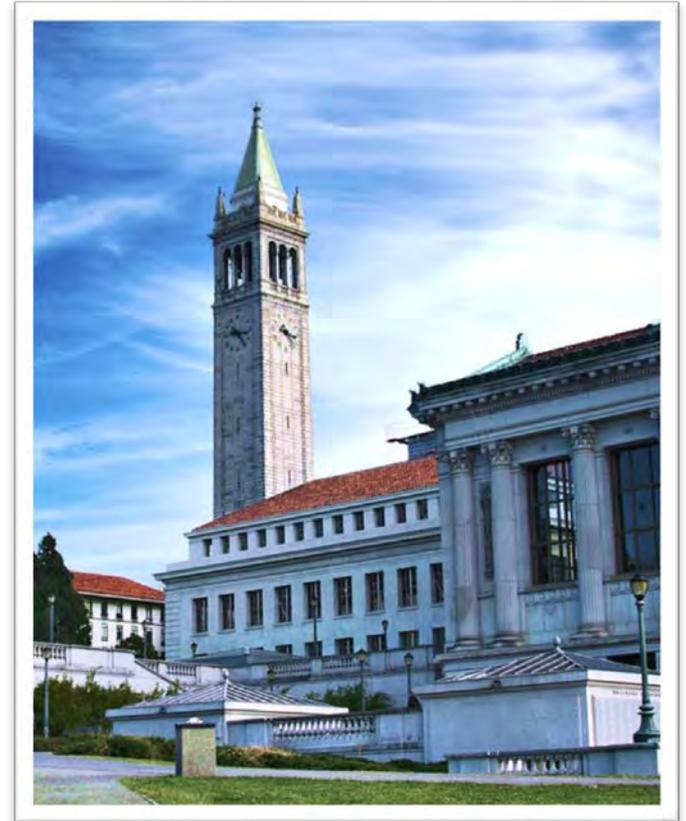
Applicants who are currently enrolled in a degree program

Minimum Bachelor's degree requirement

Minimum appointment of 1 month, maximum appointment of 1 year

UC students CANNOT be Visiting Student Researchers

Units may provide a stipend of up to \$10,000 per year which can be used to cover living expenses, travel costs, and incidental research expenses, but not as a form of salary compensation.



Exceptions for VSPA Affiliate Appointments



All exceptions for visiting scholar and visiting student researcher appointments must be granted by the VSPA Program.

All exceptions for postdoc appointments are considered on a case by case basis.

Visiting Student Researcher Appointment Exceptions

| Exceptional Request Required | | Who Writes the Request? |
|------------------------------|---|--|
| Type of Highest Degree | Undergraduate/No BA | Faculty sponsor/PI with proof of institutional funding for duration of appointment OR Chair/Dean |
| Appointment Length | Cumulative appointment time over 1 year | Faculty sponsor/PI |
| | Total Cumulative Appointment Time > 2 years | Chair/Dean of the Department VSR must provide proof of institutional funding for duration of appointment. |
| Visa Type | Visas other than J-1 or F-1 OPT. | The Gateway preparer should speak with Berkeley International Office for special visa cases |

Visiting Scholar Appointment Exceptions

| Exceptional Request Required | | Who Writes the Request? |
|------------------------------|--|--|
| Type of Highest Degree | Master's | Faculty sponsor/PI |
| | Bachelor's | Chair/Dean of the Department AND VS must provide proof of institutional funding for duration of appointment. |
| Appointment Length | Cumulative appointment time over 2 years | Faculty sponsor/PI |
| | Cumulative appointment time >5 years | Chair/Dean of the Department |
| Visa Type | Visas other than J-1 or F-1 OPT. | The Gateway preparer should speak with Berkeley International Office for special visa cases |

Additional Requirements

PATENT ACKNOWLEDGMENT

All VSPA affiliates are required to sign a Patent Acknowledgment form prior to the commencement of their research activities during on-boarding procedures.

HEALTH INSURANCE

All VSPA affiliates must meet UC Berkeley health insurance requirements.

For more information on insurance requirements, visit the Garnett-Powers website:

Visiting Scholar Benefit Plan: <http://www.garnett-powers.com/academics/ucb/>

Postdoctoral Scholar Benefit Plan: <http://www.garnett-powers.com/postdoc/index.htm/>

UNIVERSITY SERVICES FEE

All visiting scholars and visiting student researchers must pay the \$500 University Services Fee (USF).

Postdocs do NOT pay this fee.

Payment of the USF requires an HCM numerical ID number.

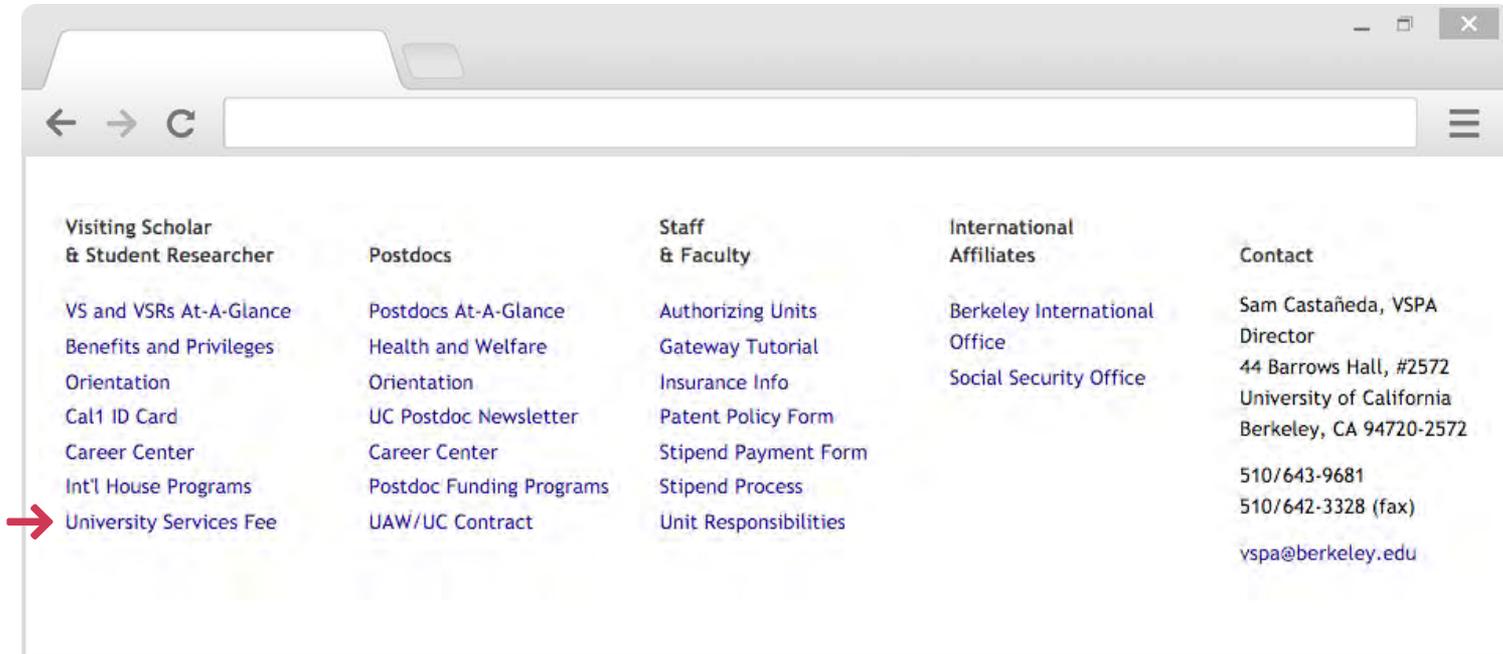
The USF is an annual fee that cannot be pro-rated.

The USF can be paid by either the affiliate or the sponsoring unit.

Affiliates may pay the University Services Fee by credit card through RegOnline.

Sponsoring units can pay via IOF or BluCard.

University Services Fee Paid by the Affiliate



To pay online:

Go to the VSPA website: <http://vspa.berkeley.edu>

Click the **University Services Fee** link. This will take you to a page where you will choose your method of payment.

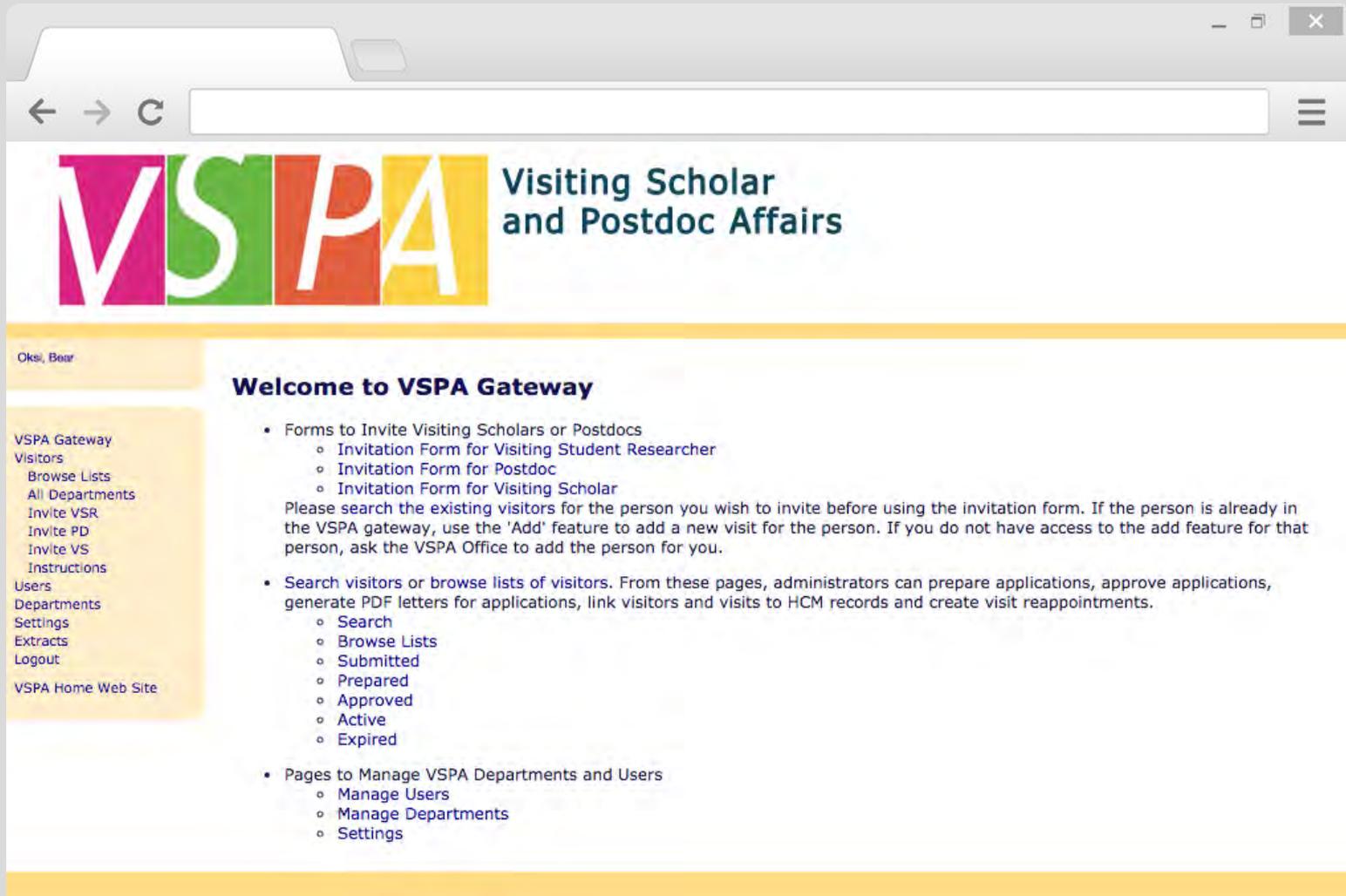
What is the VSPA Gateway?

The VSPA Gateway is an electronic tool for departmental administrators to process applications for postdocs, visiting scholars and visiting student researchers.

<https://vspa-gateway.berkeley.edu/>

CALNET AUTHENTICATION IS REQUIRED FOR ACCESS.

VSPA Gateway Homepage



Oksi, Boar

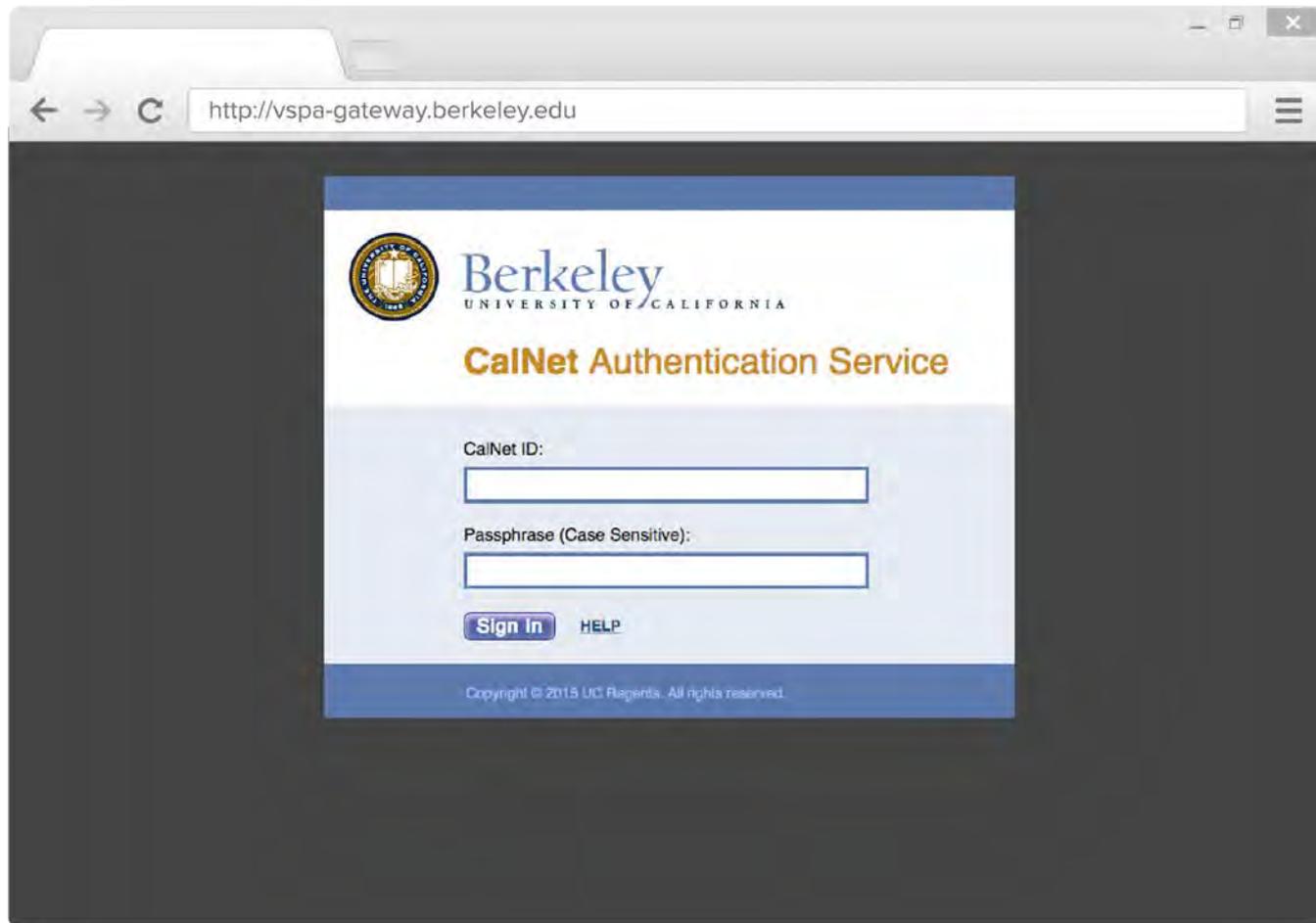
Welcome to VSPA Gateway

- Forms to Invite Visiting Scholars or Postdocs
 - Invitation Form for Visiting Student Researcher
 - Invitation Form for Postdoc
 - Invitation Form for Visiting Scholar

Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the 'Add' feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.
- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
 - Search
 - Browse Lists
 - Submitted
 - Prepared
 - Approved
 - Active
 - Expired
- Pages to Manage VSPA Departments and Users
 - Manage Users
 - Manage Departments
 - Settings

VSPA Gateway
Visitors
Browse Lists
All Departments
Invite VSR
Invite PD
Invite VS
Instructions
Users
Departments
Settings
Extracts
Logout
VSPA Home Web Site

Access to the VSPA Gateway



In order to gain or change access to the VSPA Gateway, you must have your CSS Team supervisor/leader email VSPA at vspa@berkeley.edu with your name and the departments you are requesting access to.

User Roles in the VSPA Gateway

An academic department or organized research unit invites and agrees to host an affiliate (postdoc, visiting scholar or visiting student researcher).

Campus administrators who process affiliate applications will be assigned User Role(s) in the VSPA Gateway.



Preparer

A designated departmental Preparer receives web-based applications submitted directly by the applicants.

Additionally, the departmental Preparer provides other required details regarding the proposed visit.



Approver

A designated departmental Approver receives and reviews prepared applications and decides whether to approve or decline an application.

User Roles in the VSPA Gateway



Letter Viewer

A *designated* Letter Viewer can search for affiliates only to view and obtain approval letters.

Letter Viewers cannot access the record, create any records, or make changes.

Search for Visitors

Search Conditions

Family Name:
First Name:
HCM ID:
Visitor Type:
Status:
Campus Sponsoring Unit:

Search Results

| Name | Visit Dates | Prepare | Approve | HCM |
|------------|--|---------|---------|------------|
| Bear, Oski | Sep. 04, 2015 to Dec. 03, 2015 Jan. 01, 2016 to May. 03, 2016 | | | HCM HCM |

Letters

w VS/VSRI
w VS/VSRI w VS/VSRI2

User Roles in the VSPA Gateway



HCM Viewer

A *designated* HCM Viewer can look up an affiliate's HCM information, such as their HCM ID number.

Search for Visitors

Search Conditions

Family Name:

First Name:

HCM ID:

Visitor Type:

Status:

Campus Sponsoring Unit:

Search Results

| Name | Visit Dates | Prepare | Approve | HCM |
|------------|--------------------------------|---------|---------|-----|
| Bear, Oski | Sep. 04, 2015 to Dec. 03, 2015 | | | HCM |
| | Jan. 01, 2016 to May. 03, 2016 | | | HCM |

User Roles and Department Access

Okasi, Boar

Welcome to VSPA Gateway

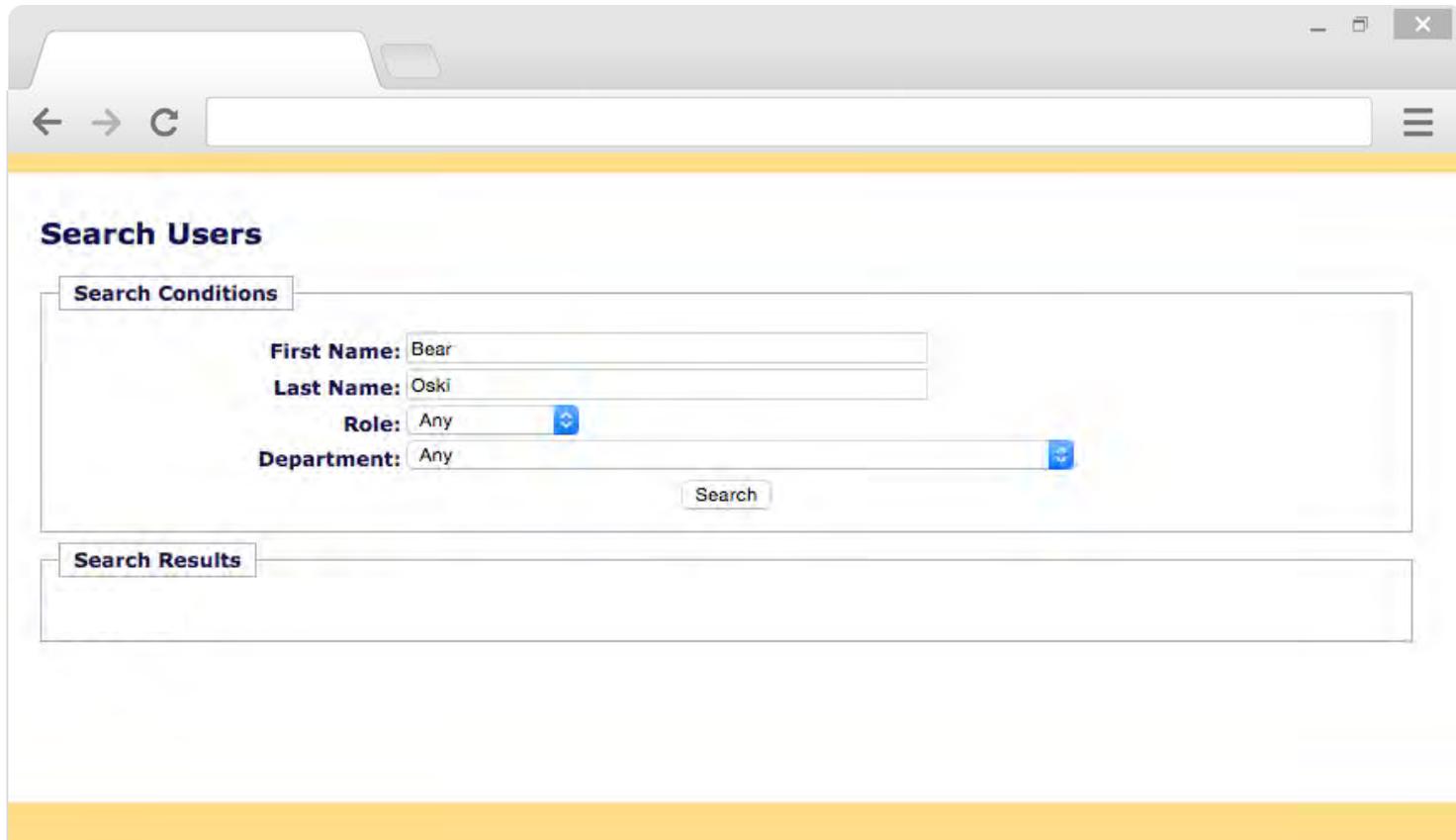
- Forms to Invite Visiting Scholars or Postdocs
 - Invitation Form for Visiting Student Researcher
 - Invitation Form for Postdoc
 - Invitation Form for Visiting Scholar
- Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the 'Add' feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.
- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
 - Search
 - Browse Lists
 - Submitted
 - Prepared
 - Approved
 - Active
 - Expired
- Pages to Manage VSPA Departments and Users
 - Manage Users
 - Manage Departments
 - Settings

Highlighted List:

- Approved
- Active
- Expired
- Pages to Manage VSPA Depart
 - **Manage Users**
 - Manage Departments
 - Settings

From the Gateway Homepage, under **Manage Users** you can find out your User Role (Preparer and/or Approver) as well as the departments/units you have access to.

User Roles and Department Access



The screenshot shows a web browser window with a search interface. The browser's address bar is empty. The page has a yellow header and footer. The main content area is titled "Search Users" and contains two sections: "Search Conditions" and "Search Results".

Search Conditions

First Name:

Last Name:

Role: 

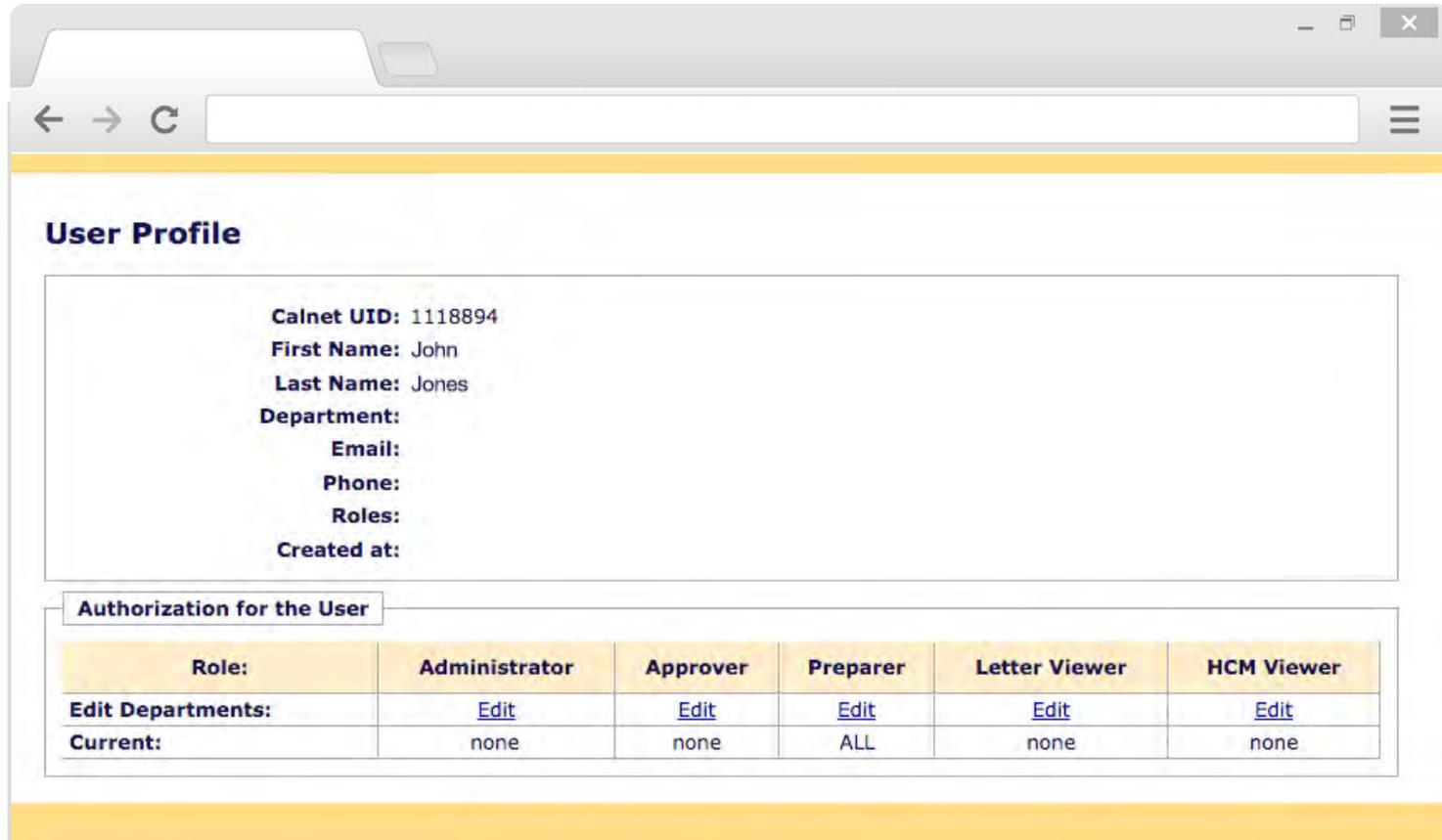
Department: 

Search Results

The "Search Results" section is currently empty.

This will take you to a page that shows you a list of all the current users in the VSPA Gateway as well as a search engine to look up specific users.

User Roles and Department Access



User Profile

Calnet UID: 1118894
First Name: John
Last Name: Jones
Department:
Email:
Phone:
Roles:
Created at:

Authorization for the User

| Role: | Administrator | Approver | Preparer | Letter Viewer | HCM Viewer |
|-------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Edit Departments: | Edit |
| Current: | none | none | ALL | none | none |

Clicking on a User's name will take you to their User Profile which will show their contact information, the departments they have access to, and the roles they have in each department.

The Pre-Arrival Process At-A-Glance

Step 1

Inviting and Submitting an Affiliate Application

Preparer invites prospective affiliate to fill out the Gateway application

Prospective affiliate fills out application and clicks **Submit**

Preparer receives notification of submitted application and reviews information for errors

OR

Preparer bypasses the invite function and goes directly to Step 2

Step 2

Preparing an Affiliate Application

If Step 1 was bypassed, Preparer completes the application on behalf of the scholar and clicks **Prepare**

OR

After Preparer reviews the submitted application, the Preparer completes the remaining application and clicks **Prepare**

Approver receives notification of the prepared application

Step 3

Approving an Affiliate Application

Approver reviews the application and verifies that all requirements are met

Approver notifies Preparer if additional information is needed

If all requirements are met, the Approver clicks **Approve** and Preparer receives an email notification with a URL to the appointment letter

If requirements are not met, Approver clicks **Decline**, and the Approver reconciles information with the Preparer who can resubmit the application

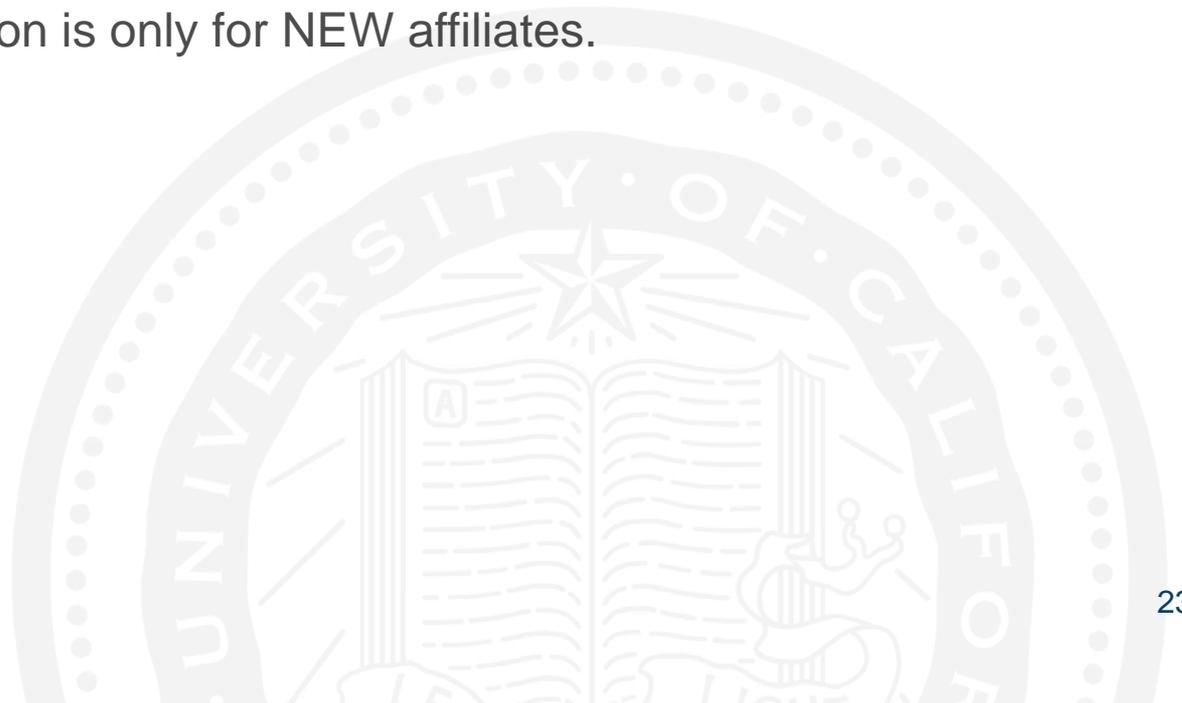
Step 1

Inviting or Submitting an Affiliate Application

The Invite Function

Once the prospective affiliate has found a faculty sponsor in a department and negotiated an appointment period, a Preparer or Approver may use the VSPA Gateway to invite the new affiliate to complete an application.

The Invite function is only for NEW affiliates.

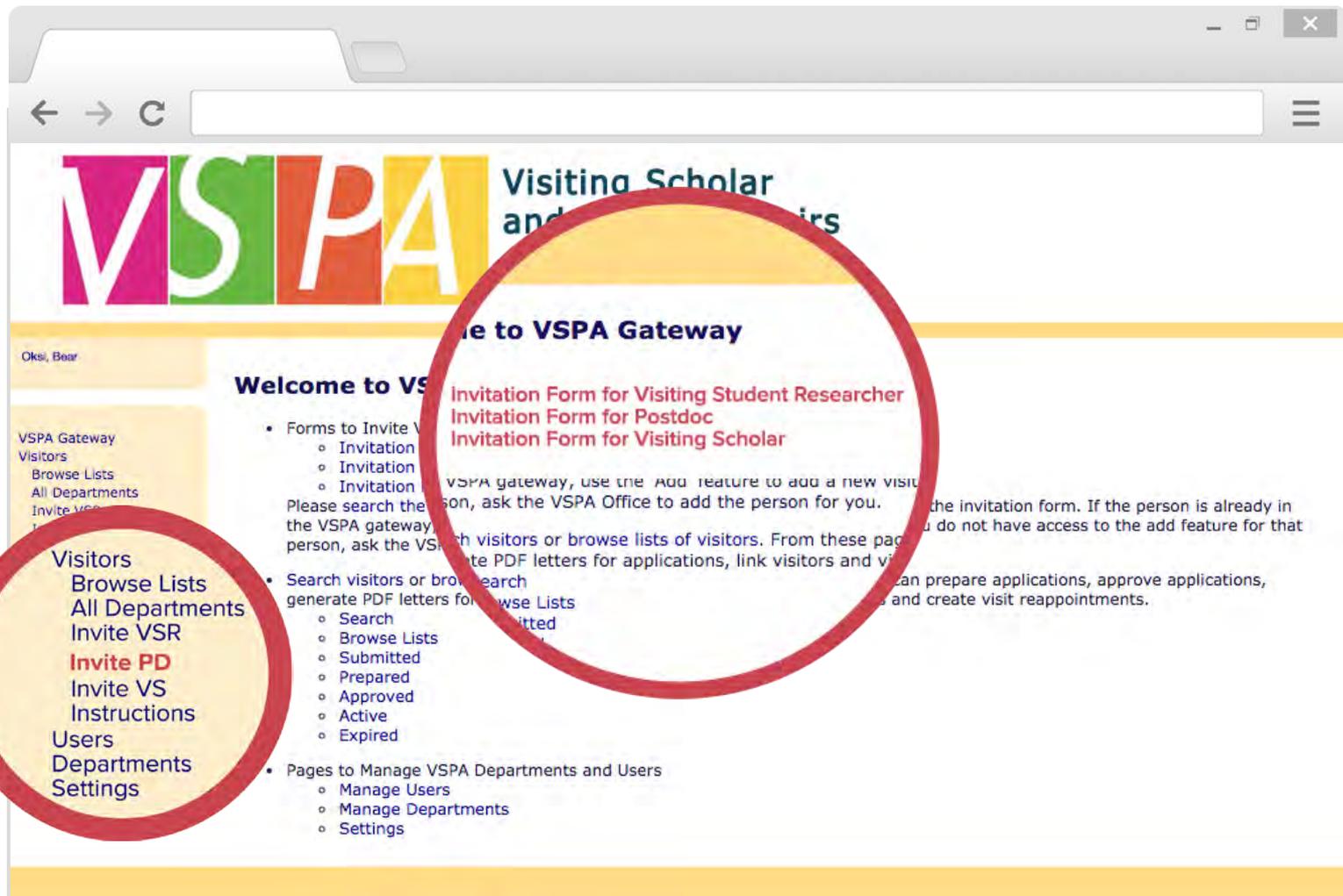


The Invite Function

The **Invite** function requires a minimum amount of information that the Preparer must first fill in:

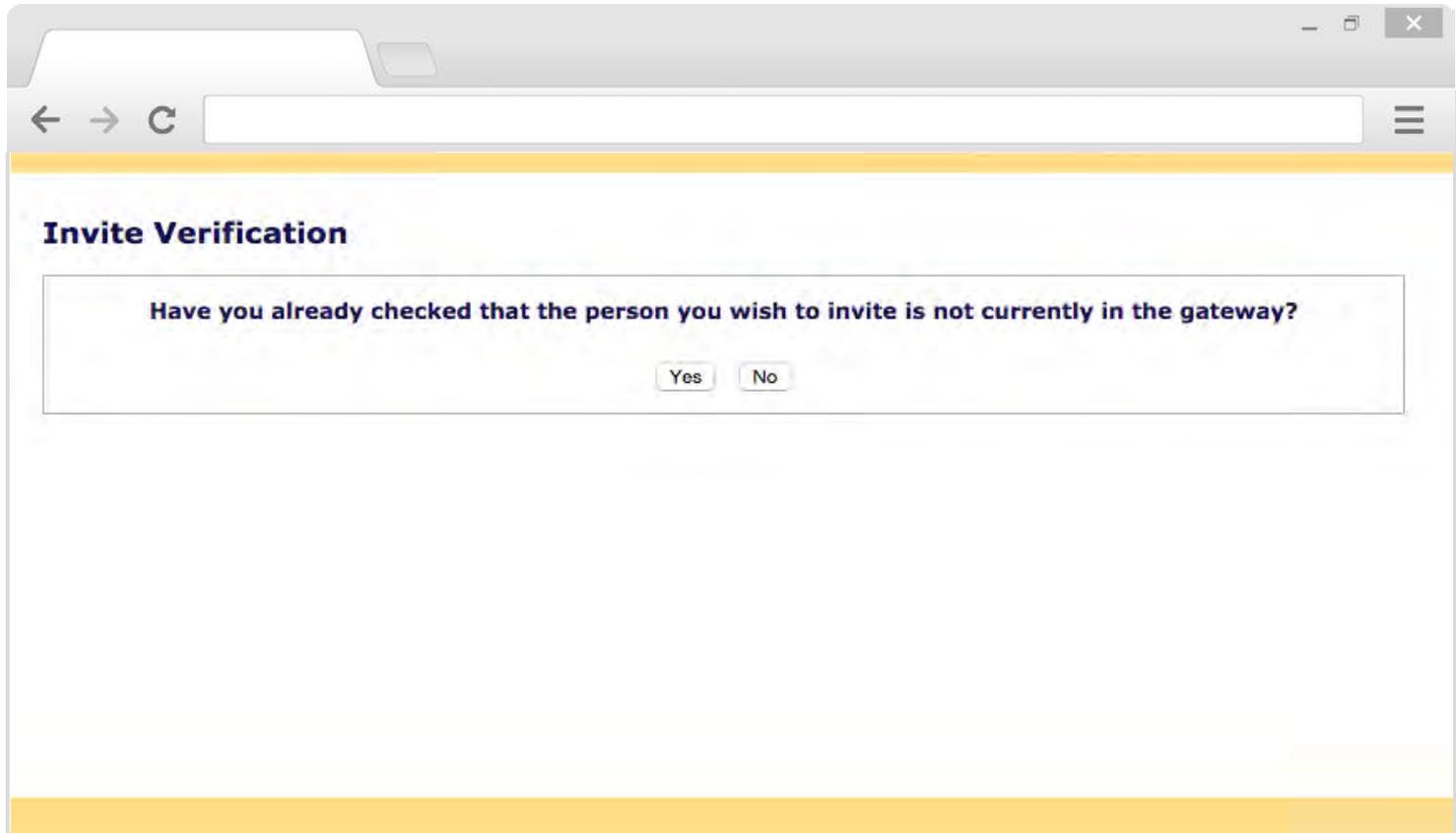
- Name
- Visa Type
- Email
- Sponsoring Department
- Visiting Dates
- Name of Sponsor

Preparers can then invite the affiliate to fill in the rest of the application or the **Invite** function may be skipped completely by a Preparer who fills in the entire application on behalf of the scholar.



From the VSPA Gateway homepage, you may invite a new visiting scholar, visiting student researcher, or a postdoc by clicking on the link. You can also reach the Prepare function through this link.

The invitation process is the same for all affiliate types.



The **Invite** function is only for **new** VSPA affiliates. Prior to any invitation form, this verification will appear.

If you have already searched for the person in the VSPA Gateway to check for any existing records, then click **Yes**.

If not, clicking **No** will automatically direct you to the search function so that you can make sure you are not creating a duplicate record.

The screenshot shows a web browser window with a browser address bar and navigation buttons. The main content area is titled "Invite" and contains three sections:

- Preparer:** A text box containing the instruction: "I, as the preparer of the proposed affiliation, have confirmed authorization from the appropriate unit head (chair of department, dean of school, dean of college, director of a ORU) to submit this application." with a checkbox to the right.
- Control Data:** A section containing:
 - Visitor Type:** A dropdown menu with the selected value "Visiting Student Researcher".
 - Administrator Notes:** A text area for entering notes.
- Personal Data:** A section containing:
 - Family Name:** Text input field with "Bear" entered.
 - First Name:** Text input field with "Oski" entered.
 - Middle Name:** Text input field.
 - Birthdate:** Three dropdown menus for Year (1868), Month (June), and Day (14), followed by the text "(Year/Month/Day)".
 - Sex:** Radio buttons for "Female" and "Male".
 - Country of Citizenship:** Dropdown menu with "USA" selected.
 - Visa Type:** Dropdown menu.

← → ↻

Permanent Address

Street:

City:

Province: (Enter if not in USA)

Country:

Zip Code/Postal Code:

Telephone:

Email:

Berkeley Email:

Opt-Out from VSPA E-mails:

This should be the address where the scholar permanently resides (e.g. home country, home state)

Proposed Visit

Status: Proposed

Application Type: Initial Application

Begin Date: (Year/Month/Day)

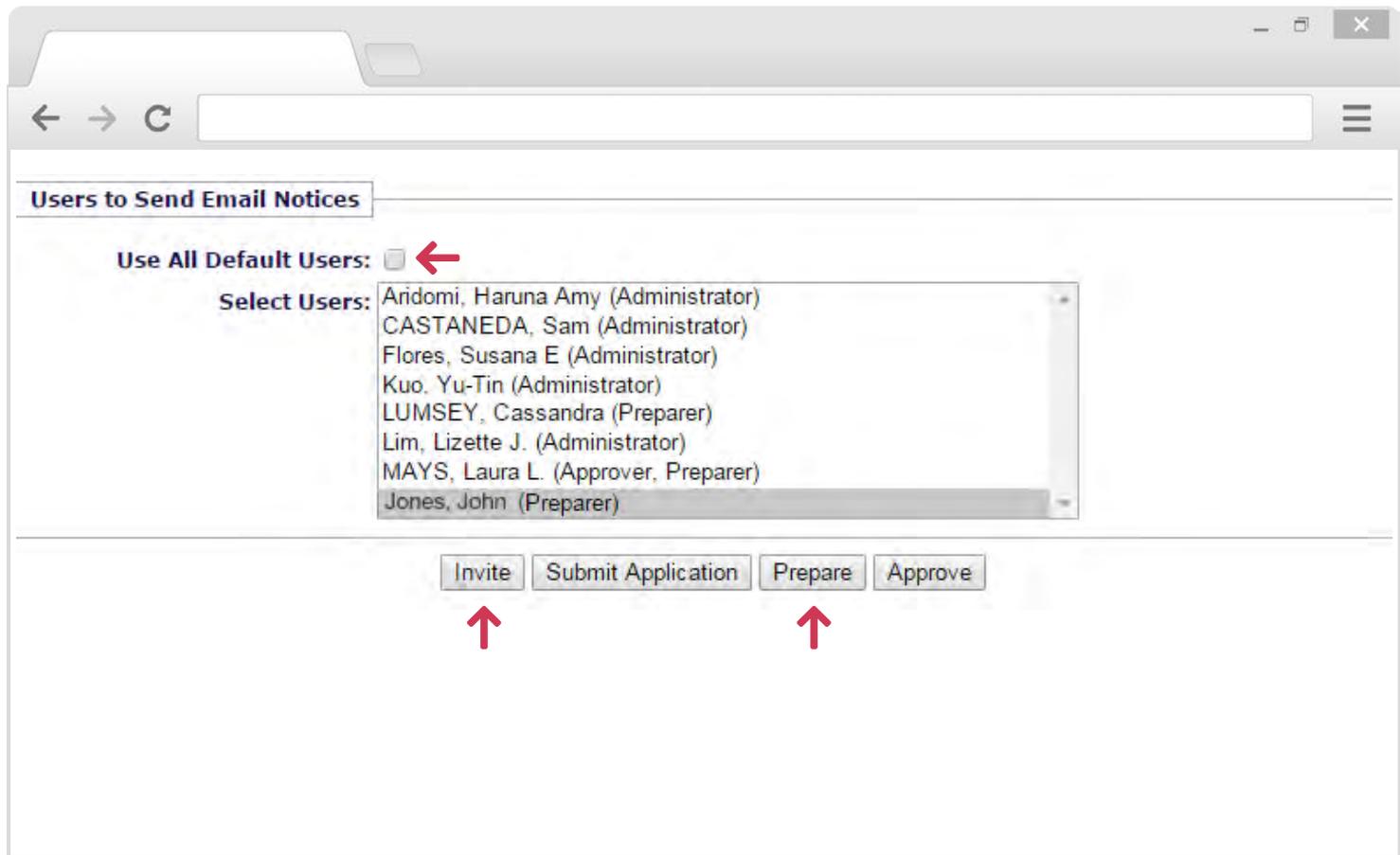
End Date: (Year/Month/Day)

Purpose of Visit:

Campus Sponsoring Unit:

Faculty or P.I. Sponsor: (Last Name, First Name)

Administrative Contact: Oski Bear

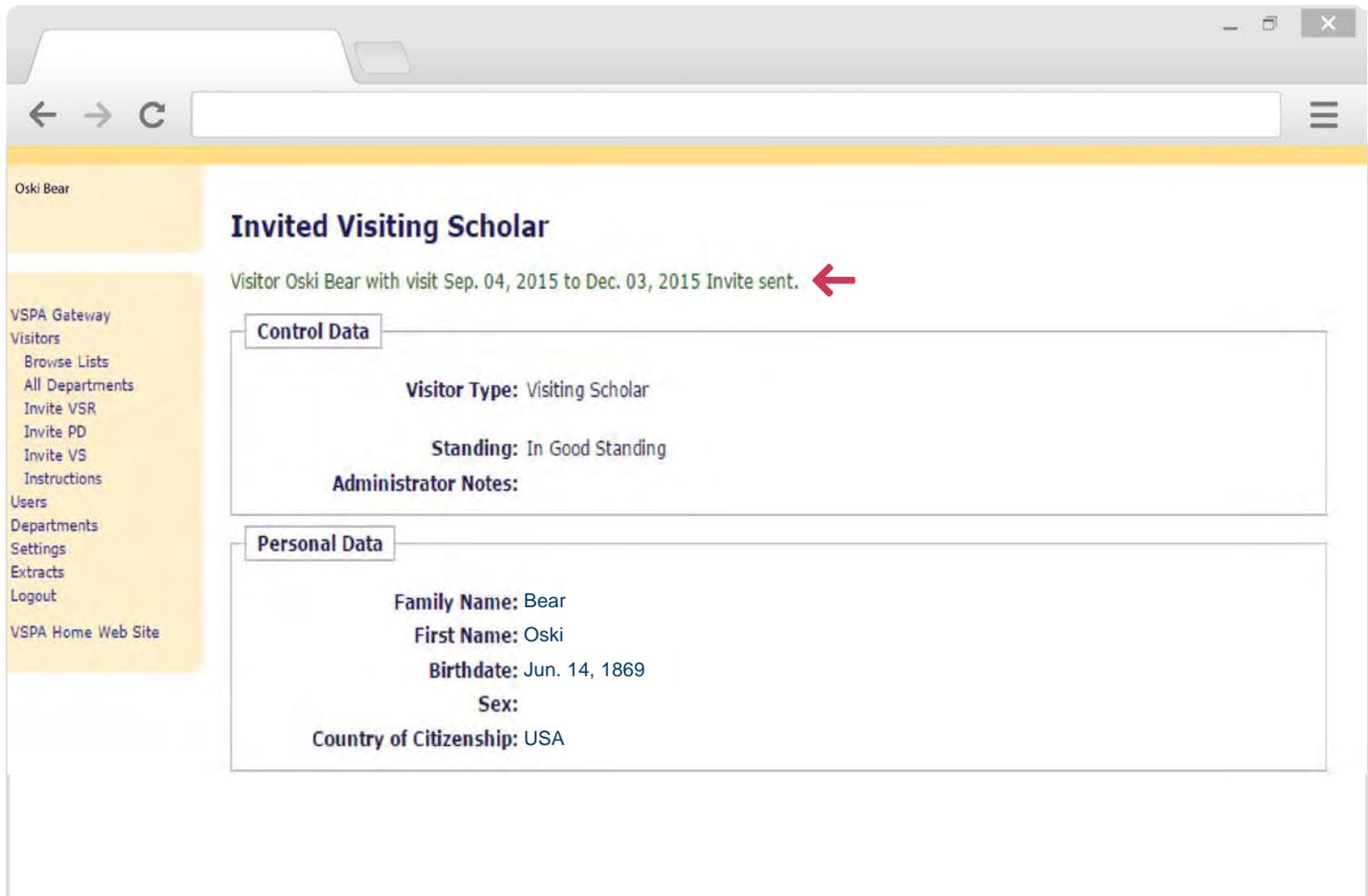


After you have filled out the required fields on the invitation form:

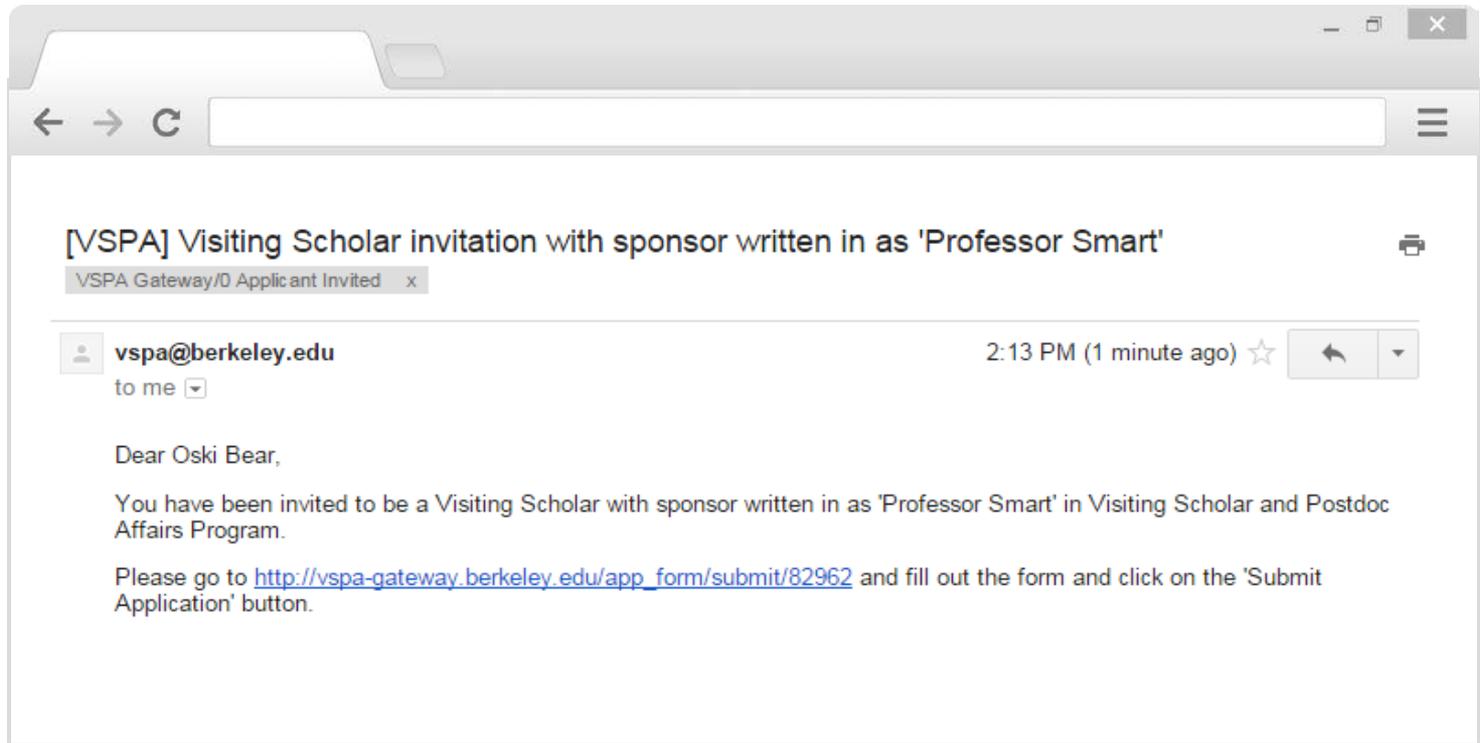
Unclick **Use All Default Users** and then select Preparers and Approvers in your department who should be notified of an incoming application.

Click **Invite** to send the application to the affiliate; OR

Click **Prepare** to submit the application to the approver for review and approval.



Invite Notification



This email will be sent to the affiliate to notify them of an invitation to fill out their application in the VSPA Gateway. The notification email is the same for all affiliates.

All Preparers and Approvers that were selected at the bottom of the invite page will be sent this same e-mail.

Application

Application for Visiting Scholar Appointment

Employment

Click this checkbox if you are currently a University of California employee.

Personal Data

Family Name:

First Name:

Middle Name:

Birthdate: (Year/Month/Day)

Sex: Female Male

Country of Citizenship:

Permanent Address

Street:

City:

State: (Enter if in USA)

Country:

Zip Code/Postal Code:

Telephone:

Email:

Berkeley Email:

This should be the address where the scholar permanently resides (e.g. home country, home state)

The link in the email will take the affiliate to the application to fill in the remaining fields.

Application

Information About Your Spouse/Partner

Family Name:
First Name:
Middle Name:
Country of Citizenship:
Email:

Academic History

Type of Highest Degree:
Date of Degree: (Year/Month)
Institution of Degree:

Current Employer

If you're employed by a company that is sponsoring your visit, please fill out the following fields.

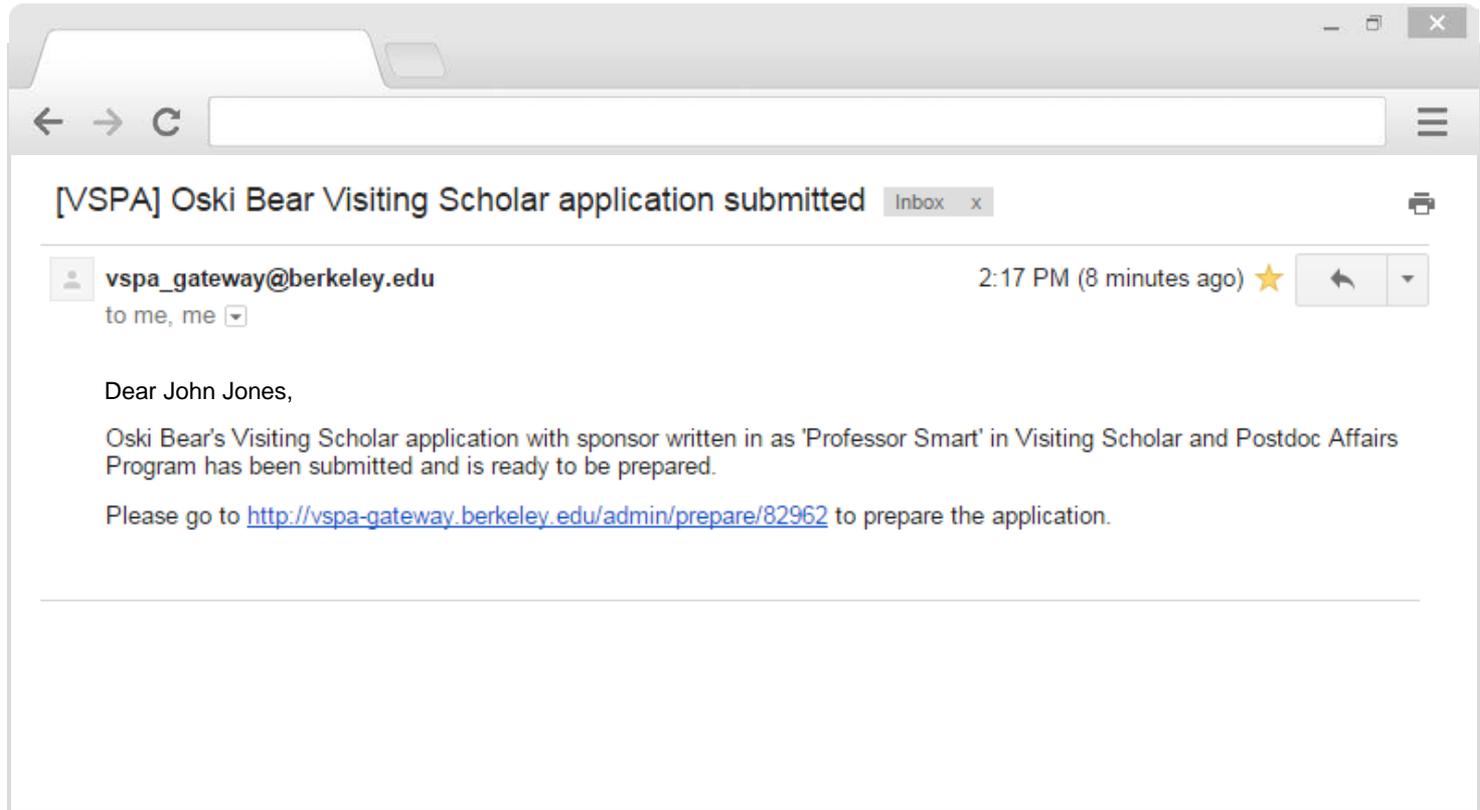
Company Name:
Position:
Company Email:
Supervisor Name:
Supervisor Email:

Proposed Visit

Begin Date: (Year/Month/Day)
End Date: (Year/Month/Day)
Purpose of Visit:
Campus Sponsoring Unit:
Faculty or P.I. Sponsor: (Last Name, First Name)

Once the scholar has filled in all the information, they can press **Submit Application** so that it is sent to the Preparer to review.

Application Notification



A notification email will be sent to the Preparer with a link to the application.

Step 2

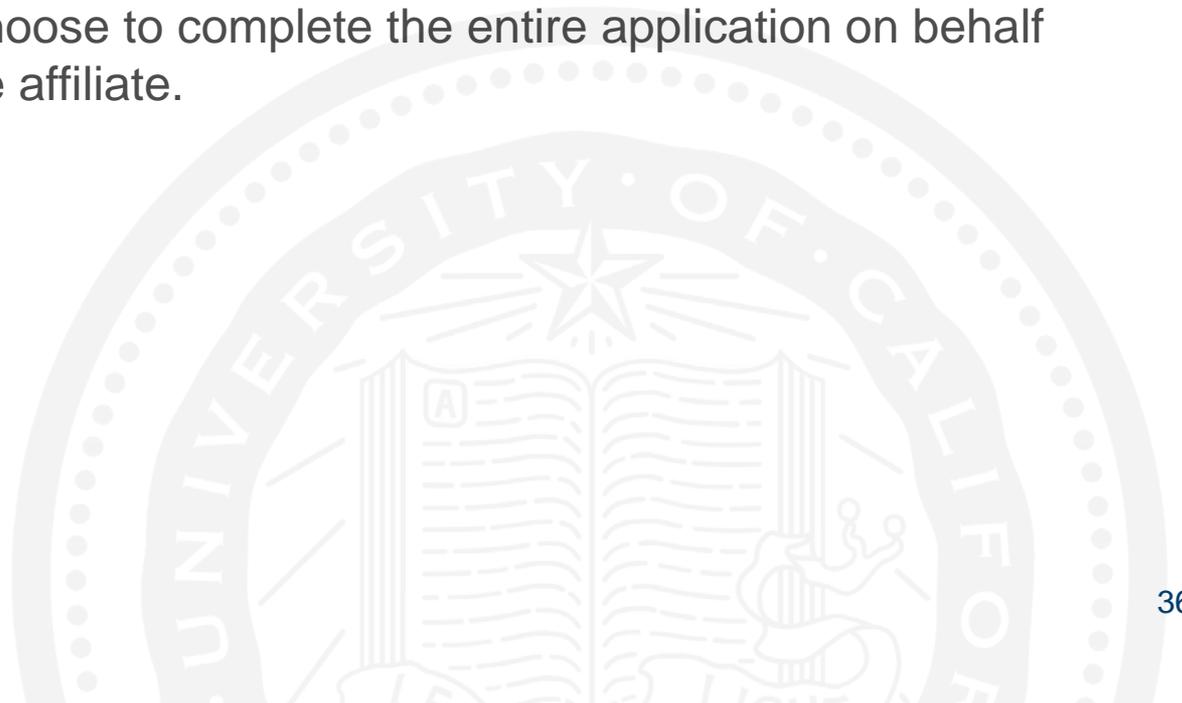
Preparing an Affiliate Application

The Prepare Function

A Preparer reviews submitted applications from the prospective affiliate for errors.

This step happens only if the Preparer decides to invite the prospective affiliate to fill in part of the application. If the submitted application has no errors, the Preparer completes the remaining data fields on the application required.

Preparers may choose to complete the entire application on behalf of the prospective affiliate.



Required Data Fields

| X= Required Field | Visiting Student Researcher | Visiting Scholar | Postdoc |
|--|-----------------------------|------------------|---------|
| Begin Date | X | X | X |
| End Date | X | X | X |
| Preparer Authorization Acceptance | X | X | X |
| Unit | X | X | X |
| Purpose of Visit (limited to 500 characters) | X | X | X |
| Name of Funding Agency | X | X | X |
| Type of Funding Source | X | X | X |
| Job Code and Title | | | X |
| Amount per Month | X | X | X |
| Building and Room # | X | X | |
| Location on Campus | | | X |
| Highest Earned Degree, Date & Location | X | X | X |
| Degree Goal & Location | X | | |
| Faculty/P.I. Sponsor | X | X | X |
| Visitor Birthday | X | X | X |
| Visitor Sex | X | X | X |
| Visitor Citizen Code | X | X | X |
| Visitor Address (Street, City, Country, Zipcode) | X | X | X |
| Visitor Visa Type Code | X | X | X |
| Visitor Email | X | X | X |

Optional Data Fields

For all prospective affiliates, optional data fields include:

Spouse/Partner Information

Current Employer

Telephone Number



Application

Invite Visiting Student Researcher

Preparer

I, as the preparer of the proposed affiliation, have confirmed authorization from the appropriate unit head (chair of department, dean of school, dean of college, director of a ORU) to submit this application.

Control Data

Visitor Type: Visiting Student Researcher

Administrator Notes:

Personal Data

Family Name:

First Name:

Middle Name:

Birthdate: (Year/Month/Day)

Sex: Female Male

Country of Citizenship:

Visa Type:

Permanent Address

Street:

City:

Province: (Enter if not in USA)

Country:

Zip Code/Postal Code:

Telephone:

Email:

Berkeley Email:

Opt-Out from VSPA E-mails:

This should be the address where the scholar permanently resides (e.g. home country, home state)

If you are filling out the application on behalf of the visitor, be sure to mark the check box at the top.

Academic History

Type of Highest Degree: (or anticipated degree) ←

Date of Degree: (or anticipated Year/Month)

Institution of Degree:

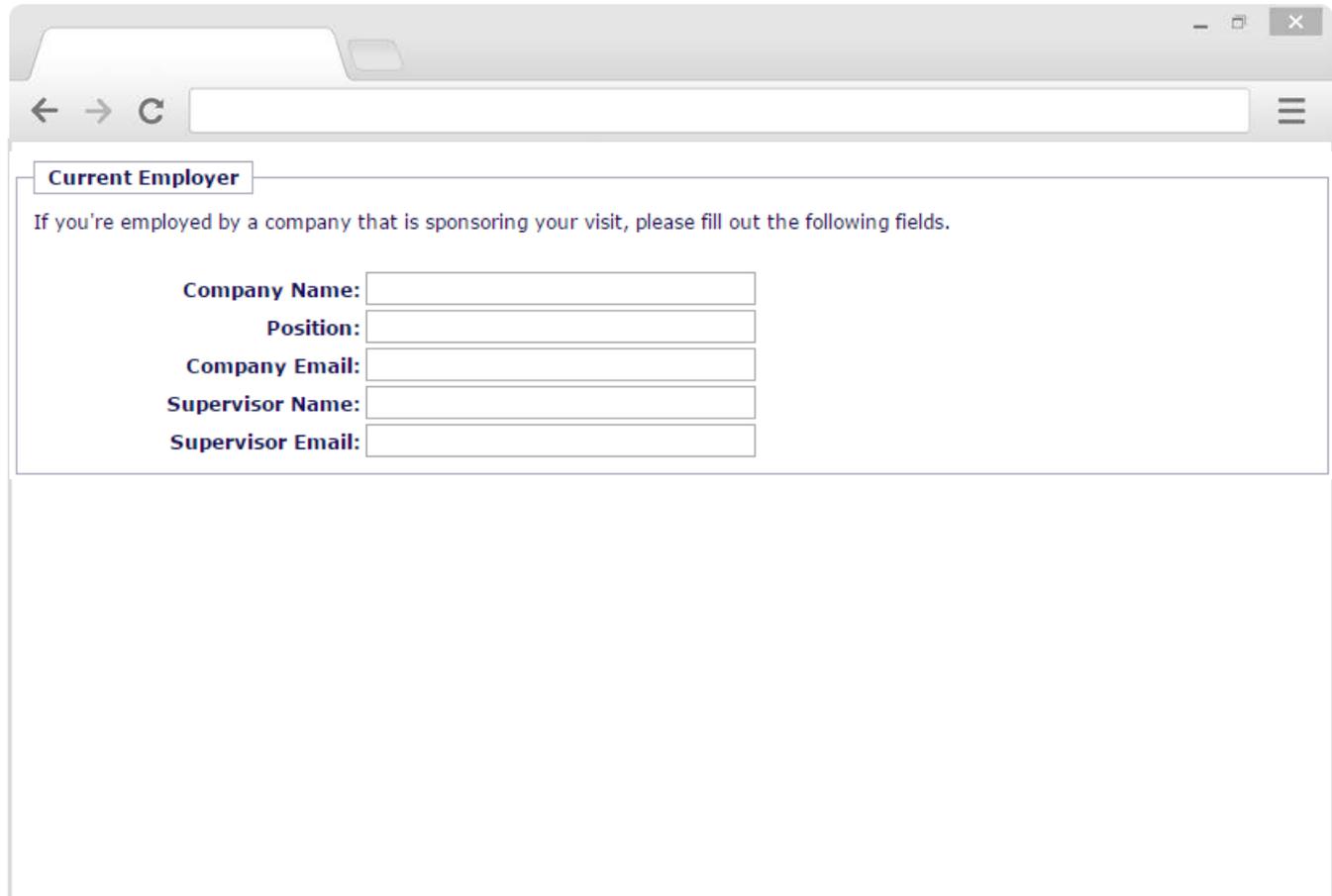
Degree goal fields only need to be filled out for visiting student researchers.

Type of Degree Goal: ←

Institution of Degree Goal:

For visiting student researchers, the **Type of Highest Degree** refers to the highest degree they have ALREADY obtained.

Visiting scholar applications will not show the **Type of Degree Goal** section.



The image shows a web browser window with a tab and address bar. The page content is titled "Current Employer" and includes a sub-header and five input fields for company and supervisor information.

Current Employer

If you're employed by a company that is sponsoring your visit, please fill out the following fields.

Company Name:

Position:

Company Email:

Supervisor Name:

Supervisor Email:

The **Current Employer** section is available for visiting scholars only. If the visitor is employed as a postdoc, professor, assistant professor or lecturer at another institution, or has a full-time paid position elsewhere, please list this information.

Financial Support While at UC Berkeley

Amount per Month: \$ 1600

Name of Funding Agency: Personal

Type of Funding Source: Personal/Self Supporting

Job Code and Title: Visiting Scholar (VS)

Work Location/Lab

Room Number: 22

Building: DWINELLE

Users to Send Email Notices

Use All Default Users:

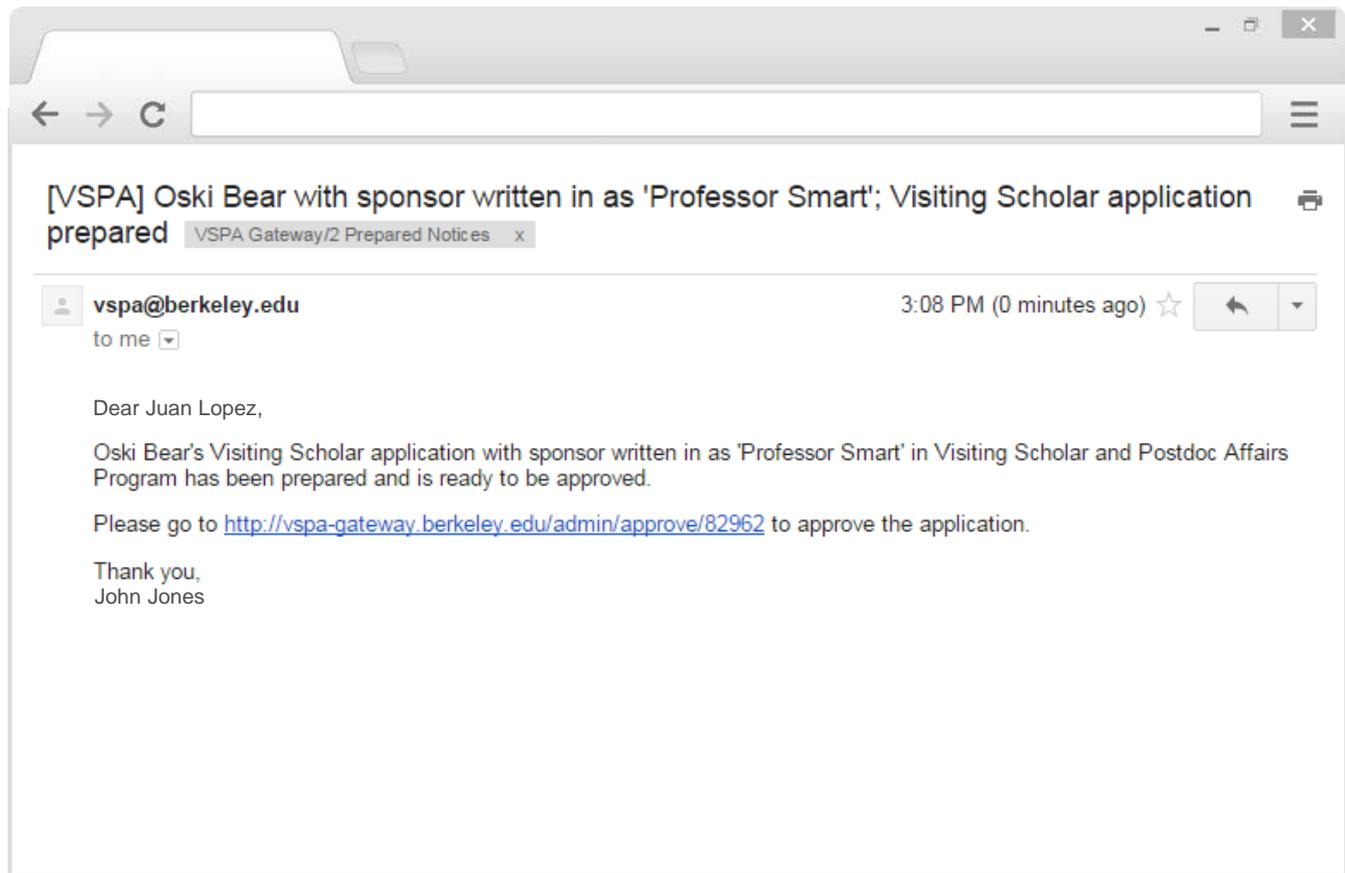
Select Users:

- Aridomi, Haruna Amy (Administrator)
- CASTANEDA, Sam (Administrator)
- Flores, Susana E (Administrator)
- Kuo, Yu-Tin (Administrator)
- LUMSEY, Cassandra (Preparer)
- Lim, Lizette J. (Administrator)
- MAYS, Laura L. (Approver, Preparer)
- Lopez, Juan (Approver)

Prepare

When you are finished preparing the application, **uncheck** Use All Default Users to select the administrators you want to notify, including the approver who will review the application. Press **Prepare**.

THE PREPARER IS RESPONSIBLE TO VERIFY ALL INFORMATION.



A notification email will be sent to the Preparer, the Approver and other administrators selected with a link to the application.

The image shows a web browser window displaying a form with two main sections: 'Permanent Address' and 'Local Mailing Address'. The 'Permanent Address' section includes fields for Street (1 Campanile Tour), City (Paris), Province (empty), Country (France), Zip Code/Postal Code (empty), Telephone (8885552222), Email (unbearable@berkeley.edu), and Berkeley Email (empty). There is an 'Opt-Out from VSPA E-mails' checkbox which is unchecked. A note below this section states: 'This should be the address where the scholar permanently resides (e.g. home country, home state)'. The 'Local Mailing Address' section includes fields for Street (1111 Berkeley Way), City (Berkeley), State (California), and Zip Code/Postal Code (94704). A note below this section states: 'This should be the address where the scholar will reside during his/her research appointment at UC Berkeley (if known). Scholars must remember to advise their department administrator if they move or change their local address during their appointment period.'

It is important to obtain the U.S. local mailing address of all affiliates while they are at Berkeley.

If the affiliate changes addresses during their research stay, they must notify the department administrator and the VSPA Gateway record must be updated.

For Postdoc Applications Only

Previous Postdoc Experience ←

Institution:

Begin Date: (Year/Month)

End Date: (Year/Month)

[Delete This](#)

[Add Another Institution](#) →

Academic History

Type of Highest Degree: PhD (or anticipated degree) ←

Date of Degree: 2014 April (or anticipated Year/Month)

Institution of Degree: UC Berkeley

This section is only for past postdoc experience at OTHER institutions, not UC Berkeley. Multiple visits at other institutions can be added by clicking on **Add Another Institution**.

Previous Postdoc Experience

Institution:

Begin Date: (Year/Month)

End Date: (Year/Month)

[Delete This](#)

[Add Another Institution](#)

Academic History

Type of Highest Degree: (or anticipated degree)

Date of Degree: (or anticipated Year/Month)

Institution of Degree:

HCM Information

HCM ID:

Proposed Visit

Status: Proposed

Application Type: Initial Application

Begin Date: (Year/Month/Day)

End Date: (Year/Month/Day)

Purpose of Visit:

Campus Sponsoring Unit:

Faculty or P.I. Sponsor: (Last Name, First Name)

Comments:

Add any comments that you would like as a personal record.

Administrative Contact: Oski Bear

Nothing in the **Comments** section should be deleted or altered!

This section is for VSPA and department administrators to make notes about a specific application. Examples: exceptional approvals, revised appointment dates.

For Postdoc Applications Only

Letter Customization

Customize Initial Postdoc Letter

Location on Campus: The postdoc's work location on campus must be typed out to include the building name and room number.

This is the physical location of the scholar's lab or research unit/department. This field will be included in the scholars' appointment and re-appointment letters.

Optional Paragraph: Optional Paragraph informs the Postdoc of any additions to the contract. Text entered here will be inserted at the end of the first paragraph of the Postdoc appointment letter.

Alternate Signature:

Dean/Chair/Director's Name:

Dean/Chair/Director's Title:

The Letter Should Be CC'd to:

Add the email addresses to whom the appointment letter should be sent upon approval

The name of the Administrative Contact will be listed automatically as a CC and does not need to be included above.

Clicking on the **Alternate Signature** box adds a customized Title and Name to the end of the Approval Letter. Otherwise, the faculty sponsor's name is automatically generated in the appointment letter.

For Postdoc Applications Only

The screenshot shows a web browser window with a form titled "Financial Support While at UC Berkeley". The form is divided into two sections: "Primary Funding" and "Supplementary Funding".

Primary Funding:

- Amount per Month: \$ 2500
- Name of Funding Agency: Government
- Type of Funding Source: Federal Govt.
- Job Code and Title: 3252 - Postdoctoral Scholar - Employee (HE)

[Add Supplementary Funding Source](#)

Supplementary Funding:

- Amount per Month: \$ 1500
- Name of Funding Agency: NIH
- Type of Funding Source: Private Agency/Business
- Job Code and Title: 3254 - Postdoctoral Scholar - Paid Direct (HD)

[Delete This](#)

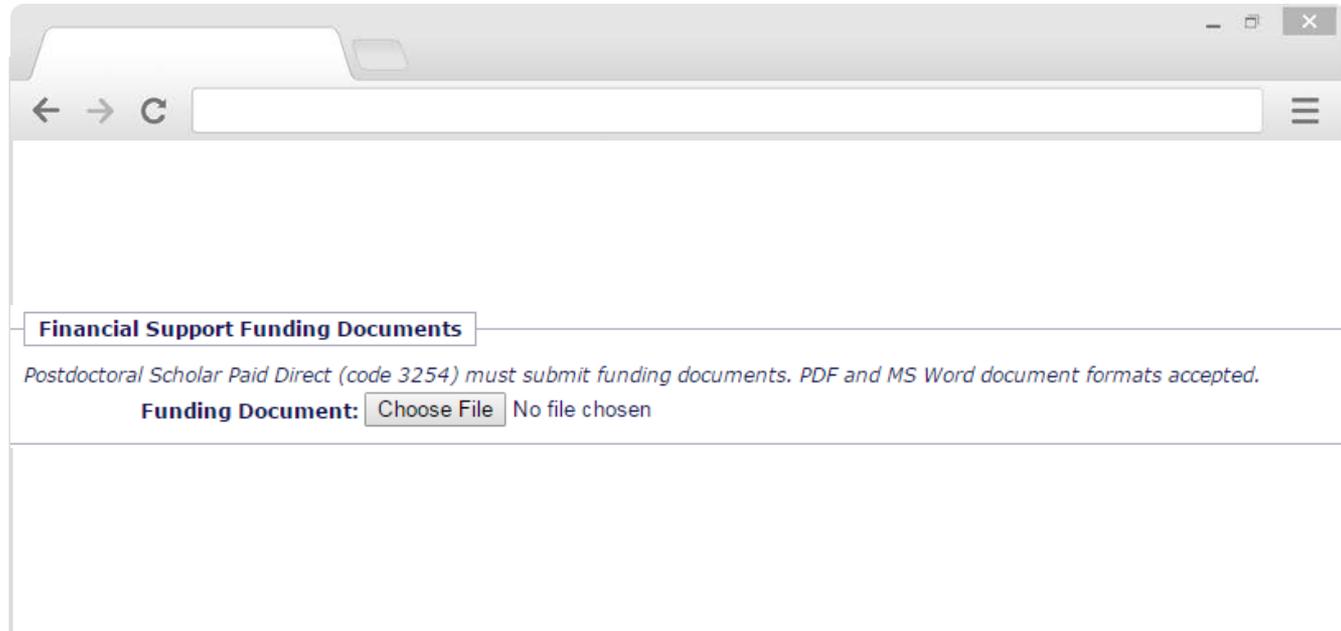
[Add Supplementary Funding Source](#)

Amount per month must be numeric with no commas.

If a postdoc has multiple funding sources, more than one postdoc job code may be needed. The primary job code is the dominant job code that provides the majority of funds.

Click on **Add Supplementary Funding Source** to add supplementary sources of funding and a secondary job code.

For Postdoc Applications Only



The screenshot shows a web browser window with a navigation bar at the top containing back, forward, and refresh icons, and a search bar. Below the navigation bar is a form titled "Financial Support Funding Documents". The form contains the following text: "Postdoctoral Scholar Paid Direct (code 3254) must submit funding documents. PDF and MS Word document formats accepted." Below this text is a label "Funding Document:" followed by a "Choose File" button and the text "No file chosen".

For Postdoc Paid Directs (3254) funding documents must be uploaded.

Please combine all funding documents into 1 file as there is a 1 file maximum.

Step 3

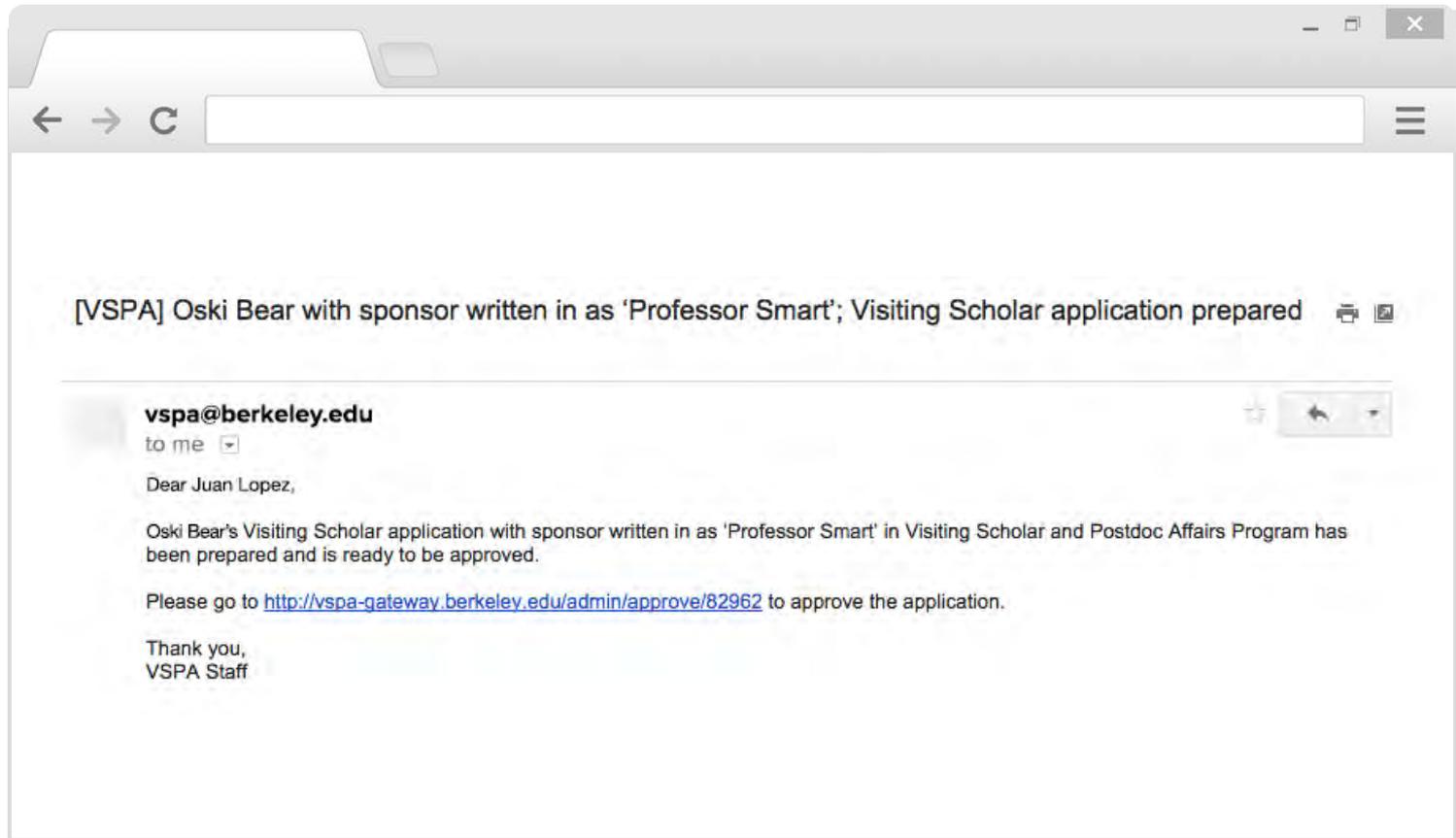
Approving an Affiliate Application

Approval Process

An Approver reviews a completed application and checks for compliance and accuracy. If everything is correct, the Approver presses **Approve**.

If there are issues with the application, the Approver notifies the Preparer listed on the VSPA Gateway application.





Once the Preparer completes the application and presses **Prepare**, the Approver will receive the above e-mail.

To review the application, the Approver clicks on the link provided in the email.

The screenshot shows a web browser window displaying a form titled "Financial Support While at UC Berkeley". The form is divided into three main sections:

- Financial Support While at UC Berkeley:** This section contains four input fields: "Amount per Month: \$" with the value "1600", "Name of Funding Agency:" with the value "Personal", "Type of Funding Source:" with a dropdown menu set to "Personal/Self Supporting", and "Job Code and Title:" with a dropdown menu set to "Visiting Scholar (VS)".
- Work Location/Lab:** This section contains two input fields: "Room Number:" with the value "22" and "Building:" with a dropdown menu set to "DWINELLE".
- Users to Send Email Notices:** This section contains a checkbox labeled "Use All Default Users:" which is currently unchecked. Below it is a "Select Users:" dropdown menu with a scrollable list of names and roles: Aridomi, Haruna Amy (Administrator), CASTANEDA, Sam (Administrator), Flores, Susana E (Administrator), Kuo, Yu-Tin (Administrator), LUMSEY, Cassandra (Preparer), Lim, Lizette J. (Administrator), MAYS, Laura L. (Approver, Preparer), and Jones, John (Preparer). The "Jones, John (Preparer)" entry is currently selected.

At the bottom of the form, there are two buttons: "Approve" and "Decline".

If the application meets VSPA requirements, the Approver presses **Approve**.

If there is missing or incorrect information, the Approver notifies the Preparer to resolve any discrepancies.



The screenshot shows a web browser window with a yellow header bar. The main content area displays the following information:

Approved for Visit of Oski Bear

Visitor Oski Bear with visit Sep. 04, 2015 to Dec. 03, 2015 Approve succeeded.

[Click here to get visiting scholar letter.](#)
[Click here to get visiting scholar letter in word format.](#)

Control Data

Visitor Type: Visiting Scholar

Standing: In Good Standing

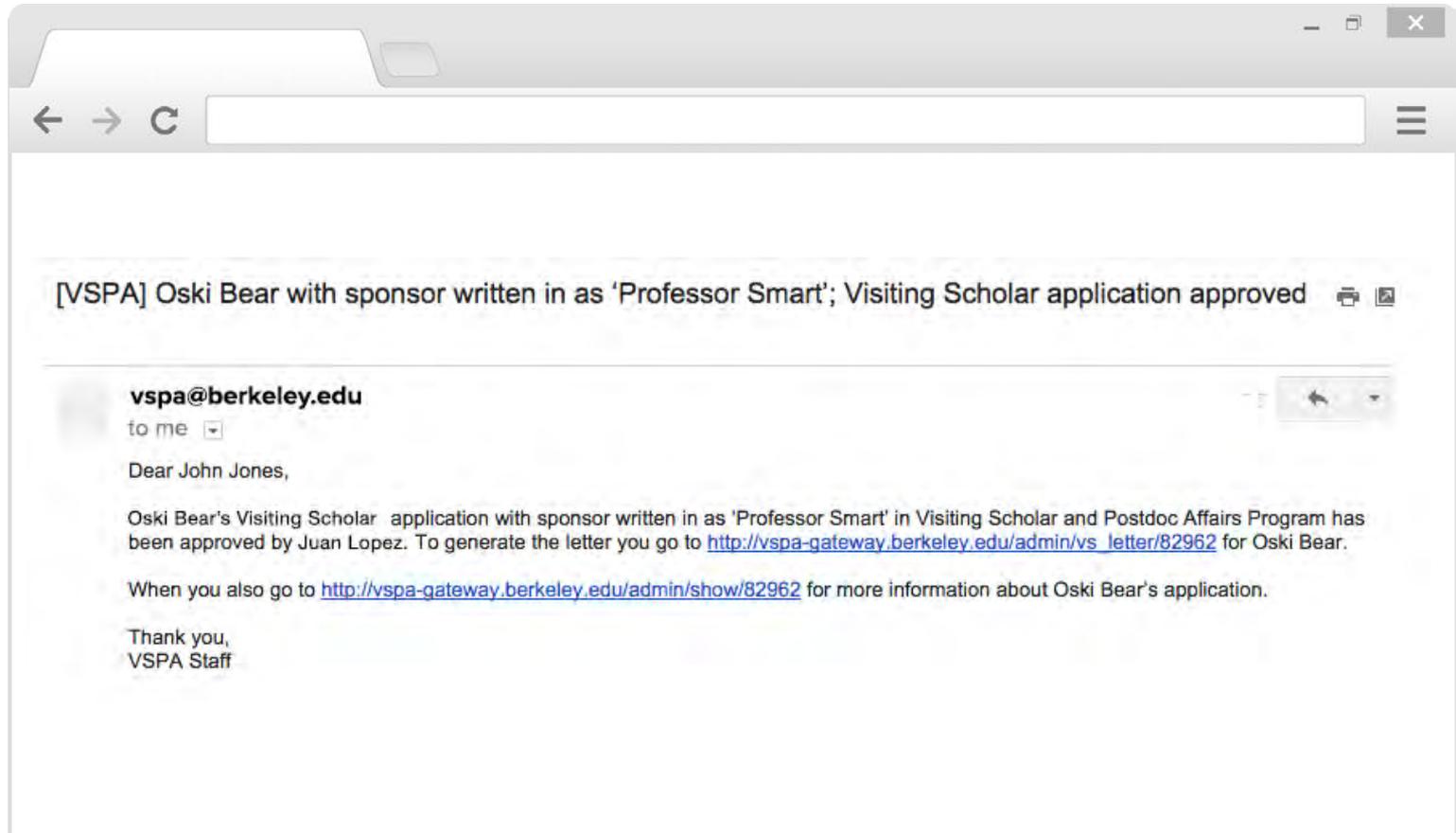
Administrator Notes:

Personal Data

Family Name: Bear
First Name: Oski
Birthdate: Jun. 14, 1989
Sex: Female
Country of Citizenship: USA

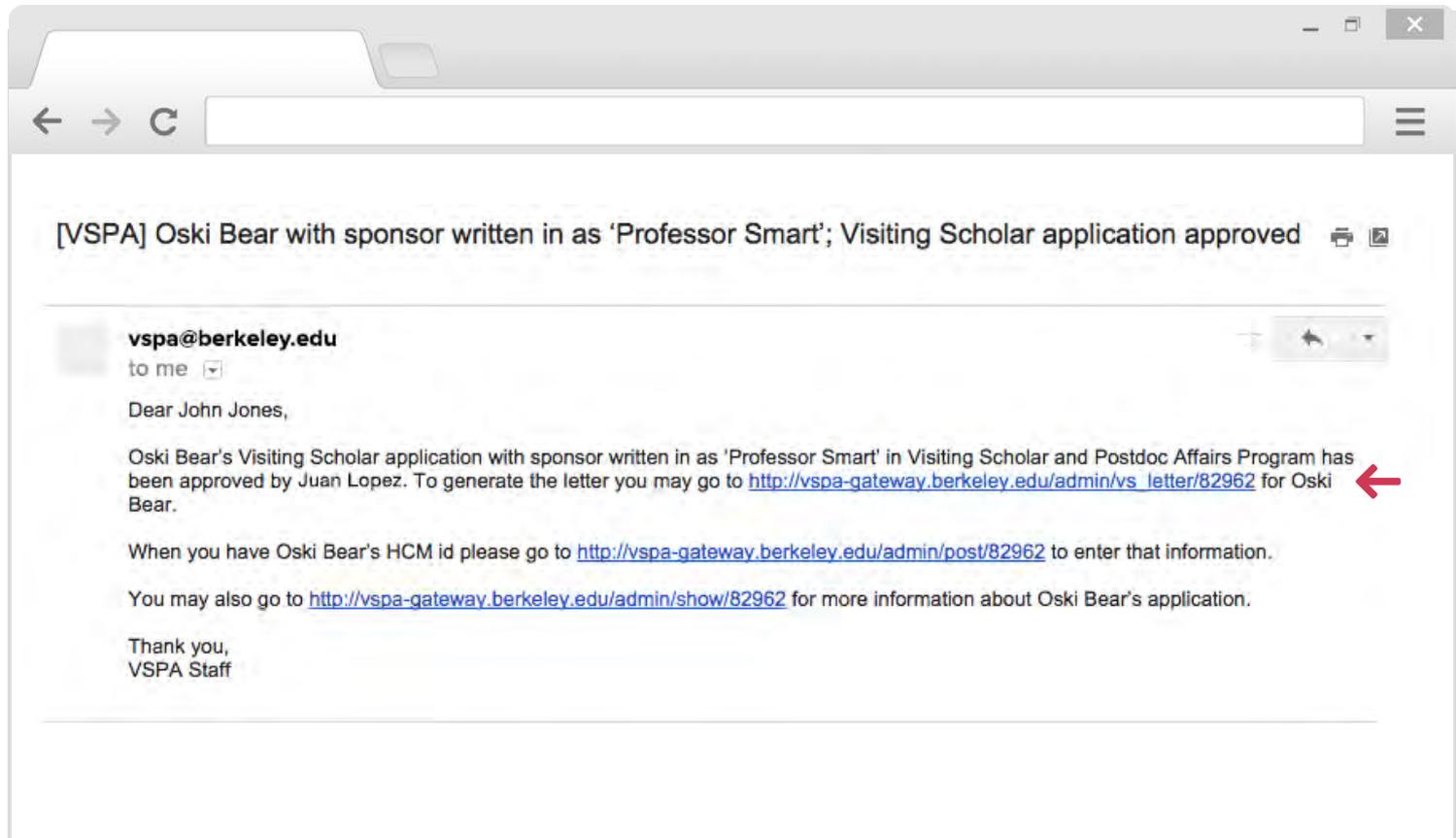
When the application has been successfully approved, the Approver will receive the above message.

Approval Notification



This e-mail message will be sent to the users selected in the application once the application has been approved.

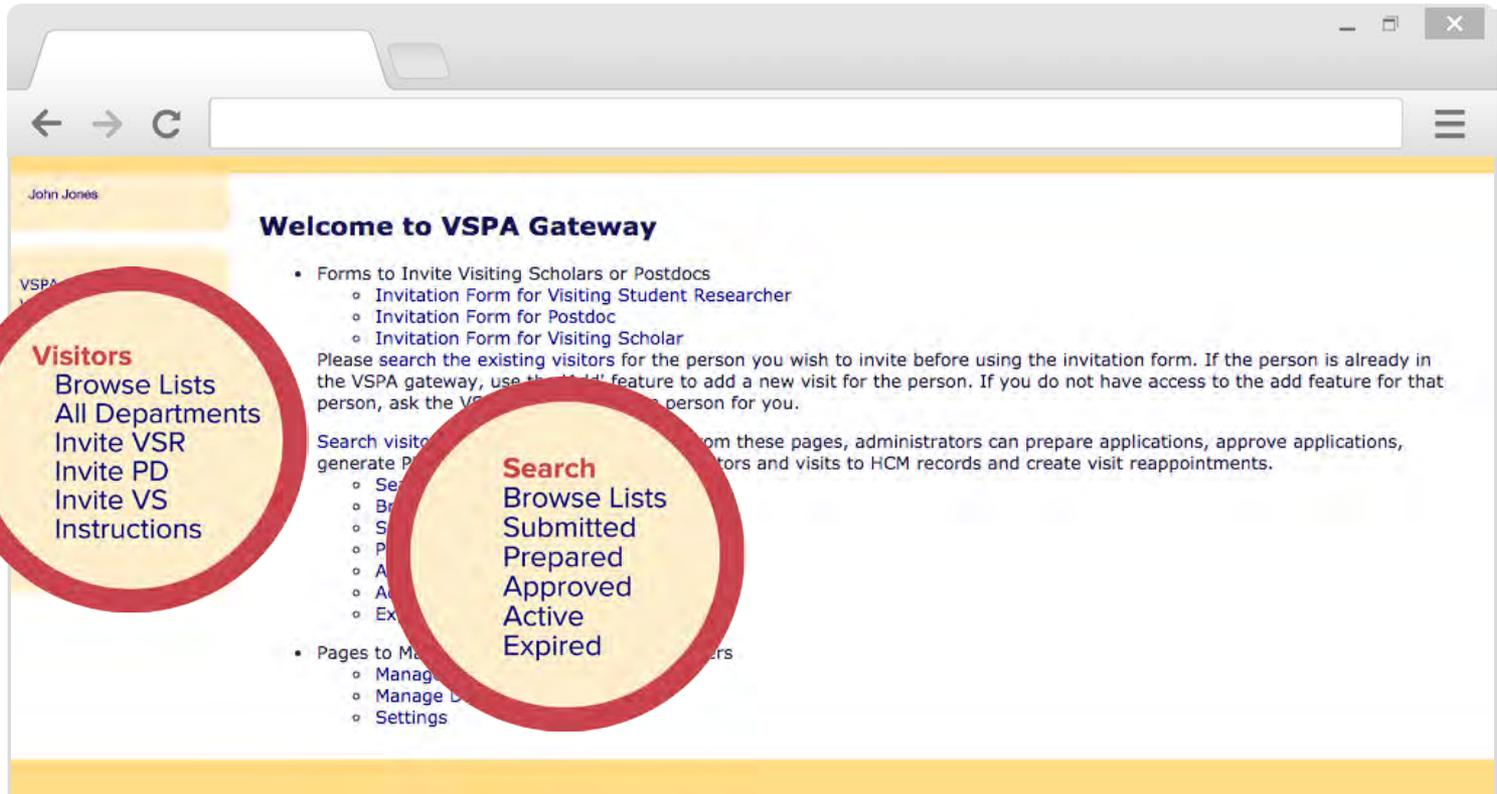
Appointment Letters



To get the appointment letter for an affiliate, click on the link in the e-mail approval notification.

Appointment Letters

PRE-ARRIVAL
POST-APPROVAL



You can also retrieve letters by using the search function by going to the VSPA Gateway homepage and clicking on either **Visitors** in the left hand side or **Search**.

Appointment Letters

PRE-ARRIVAL
POST-APPROVAL

Search for Visitors

Search Conditions

Family Name:
First Name:
HCM ID:
Visitor Type:
Status:
Campus Sponsoring Unit:

Search Results

| Name | Visit Dates | Prepare | Approve | HCM | Letters | +/- |
|------------|--------------------------------|---------|---------|-----|---------------------|------------|
| Bear, Oski | Sep. 04, 2015 to Dec. 03, 2015 | | | HCM | w VS/VSR1 | Add Remove |
| | Jan. 01, 2016 to May. 03, 2016 | | | HCM | w VS/VSR1 w VS/VSR2 | Add Remove |

Search Results

| Name | Visit Dates | Prepare | Approve | HCM | Letters | +/- |
|-----------------|--------------------------------|---------|---------|-----|-------------|------------|
| Postdoc, Poesie | Nov. 18, 2015 to Nov. 17, 2016 | | | HCM | w PD1 | Add Remove |
| | Nov. 18, 2016 to Nov. 17, 2017 | | | HCM | w PD1 w PD2 | Add Remove |

When the affiliate's name shows up, click on **VS/VSR1** or **PD1** under the **Letters** column to obtain the appointment letter.

Postdoc Appointment Letter

Per UC Berkeley agreement with the United Auto Workers/Postdoc Research Organization (UAW/PRO), the appointment letter must include the following information:

Job code

Supervisor's name

Anticipated worksite

Source of funding information

Brief description of research project

Summary of health and welfare benefits provided by UC

Appointment percentage and appointment begin and end dates

Name of sponsoring department or organized research unit

Statement that position is covered by collective bargaining unit (UAW/PRO/UC)

Statement about personnel files and access

Contact person for information about appointment

Sample Postdoc Appointment Letter

UNIVERSITY OF CALIFORNIA, BERKELEY

BERKELEY • DAVIS • IRVINE • LOS ANGELES • MERCED • RIVERSIDE • SAN DIEGO • SAN FRANCISCO



SANTA BARBARA • SANTA CRUZ

POSTDOCTORAL SCHOLAR OFFER/APPOINTMENT LETTER

August 21, 2014

Penelope Postdoc
1432 Vine Street
Berkeley, California 94708

Dear Penelope,

I am pleased to offer you an appointment as a Postdoctoral Scholar - Employee (3252C), in the Energy Biosciences Institute, for the period September 1, 2014 through August 31, 2015. Your full-time (100%) appointment will provide an annual base salary or stipend in the amount of \$42,000 funded by National Cullinary Institute. You will report to Gertrude Ghiradelli as your supervisor and will be located at 354 Stanley Hall. Your research will be focused on: researching chocolate melting points for truffles. This appointment is contingent upon receipt of your Ph.D. certification prior to your start date.

Your work will be featured in the annual Cal Day truffle tasting booth.

It is within the University's sole discretion to appoint, reappoint, or not reappoint a Postdoctoral Scholar. This appointment is limited to the dates specified above and is self-terminating unless you are otherwise notified in writing.

Under Federal Law, the University of California may employ only individuals who are legally able to work in the United States. Documentation establishing this eligibility must be made available to the University within three business days from the start date of employment. It is your responsibility to ensure that you present the appropriate documents promptly upon your arrival to campus.

Contact Information & Signature

If you have any questions regarding your appointment, please contact **John Jones** at 510-643-9681 or vspa@berkeley.edu. If you agree to the terms outlined in this offer, please indicate your acceptance by returning a signed copy of this letter to Rachel Min Park as soon as possible.

I look forward to having you as a colleague at Berkeley.

Sincerely,

Professor Smart

Attachment: Appendix A

cc: John Jones

Please sign and date below to indicate that you have read and accept the terms of this offer.

Signature _____ Date _____

Upon your arrival to campus, please sign and date below to indicate that you have accepted the terms of this appointment.

Signature _____ Date _____

The administrator's name and contact information will automatically be filled as listed in the Gateway.

The letter will be signed by the affiliate's faculty sponsor/PI unless the **Alternate Signature** box is checked in the Postdoc application.

Postdoc Scholar Benefit Plan

2014 Health and Welfare Postdoctoral Scholar Benefit Plan

The 2014 Benefits information for all postdoctoral scholars is outlined below. Please review the rates and options available which include postdocs and their dependents. Postdoctoral Scholar Employees (title code 3252) will pay the rates as noted; Postdoctoral Fellows (title code 3253) may have some or all of the institutional allowance used to pay the UC's share; and Postdoctoral Paid Directs (title code 3254) may be billed for UC's share if the funding agency has provided funding for health care benefits directly to the postdoc.

Contributions

Per the negotiated Side Letter Agreement, the 2014 monthly contribution levels for the HMO Plan will remain the same percentages (2% for postdoc only and postdoc plus child(ren); 3% for postdoc plus spouse or family coverage) and the monthly contribution levels for the PPO Plan will be \$20 for postdoc only, \$40 for postdoc plus spouse or child(ren), and \$60 for family. Please refer to the chart below for more details.

| University of California Postdoctoral Scholar Benefit Plan "PSBP" 2014 Monthly Premium Rates Effective 01-01-14 through 12-31-14 | | | | |
|--|------------|----------------------|------------|----------------------|
| Coverage Level | HMO | | PPO | |
| | UC | Postdoctoral Scholar | UC | Postdoctoral Scholar |
| Postdoctoral Scholar | \$472.65 | \$9.45 | \$464.79 | \$20.00 |
| Postdoctoral Scholar + Partner | \$1134.46 | \$34.03 | \$1115.50 | \$40.00 |
| Postdoctoral Scholar + Child(ren) | \$827.21 | \$16.54 | \$813.40 | \$40.00 |
| Postdoctoral Scholar Family | \$1,441.68 | \$43.25 | \$1,417.64 | \$60.00 |

You may also enroll for dental and vision benefits.
The cost of those premiums are paid for by the University.

All postdoctoral scholar monthly contributions are due on the first of the month. If you are paid through payroll system your contribution will continue to be deducted from your paycheck. If you do not receive pay through the payroll system, you will be billed from Garnett-Powers & Associates. Look for additional information in the mail from Garnett-Powers & Associates.

For more information, visit: <http://www.garnett-powers.com/postdoc> or contact your campus postdoctoral scholar benefits office, Garnett-Powers or the Union for Postdoctoral Scholars, UAW Local 5810 (uaw5810@uaw5810.org), if you have questions.



Appendix A, Health and Welfare Postdoctoral Scholar Benefit Plan is the last page of the appointment letter and gives additional information about benefits for postdoctoral scholars.

This appendix page is updated on an annual basis.

PRE-ARRIVAL
POST-APPROVAL

Letter Customization

Text from the **Letter Customization** section of the VSPA Gateway will be included in the letter.

For the initial and reappointment postdoc letters, the following fields can be customized:

- Location on Campus
- Letter By
- Letter Date



Letter Customization

The screenshot shows a web browser window with a 'Letter Customization' form. The form is titled 'Letter Customization' and contains the following sections:

- Letter Customization** (Section Header)
- Customize Initial Postdoc Letter* (Sub-header)
- Location on Campus:** A large text input field.
- This is the physical location of the scholar's lab or research unit/department. This field will be included in the scholars' appointment and re-appointment letters.
- Optional Paragraph:** A large text input field.
- Alternate Signature:** A small square icon.
- The Letter Should Be CC'd to:** Three stacked text input fields.
- The name of the Administrative Contact will be listed automatically as a CC and does not need to be included above.

Sample Visiting Scholar Appointment Letter

UNIVERSITY OF CALIFORNIA, BERKELEY

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SANTA BARBARA • SANTA CRUZ

University of California, Berkeley
Visiting Scholar and Postdoc Affairs (VSPA) Program
<https://vspa.berkeley.edu>
44 Barrows Hall

September 3, 2015

TO: Oski Bear
vspa@berkeley.edu

FROM: Sam Castaneda, Director

A handwritten signature in black ink, appearing to read 'MCA'.

VSPA PROGRAM AFFILIATE AUTHORIZATION

I am pleased to provide confirmation that you have been appointed as a Visiting Scholar in the Visiting Scholar and Postdoc Affairs Program beginning September 4, 2015 and ending December 3, 2015.

As a visiting scholar or visiting student researcher at Berkeley, you are now part of a renowned research community that fosters innovative thinking as well as creativity and collaboration across all fields. To this regard, the Visiting Scholar and Postdoc Affairs (VSPA) Program is dedicated to enhancing your research experience at UC Berkeley. In order to ease your transition to Berkeley, we have developed numerous support programs and services that are available to you. To learn more about them, we encourage you to attend our New Affiliate Orientation which is held the first Thursday of every month. The dates and registration process for the New Affiliate Orientation is available at <http://vspa.berkeley.edu/postdoc-and-visiting-scholar-orientation>. You can also view [Getting Started](#), a brief summary of the procedures to get recognized for service once you arrive.

University Services Fee

In order to gain access to numerous university privileges and resources, including Berkeley ID cards, library access, and a Berkeley email account, visiting scholars and visiting student researchers must pay the University Services Fee within 3 days of their appointment start date. This fee is mandatory and must be paid in order for affiliates to be in compliance with VSPA Program affiliation requirements. For more information on how to pay the fee, please go to <http://vspa.berkeley.edu/visiting-researcher-scholar-post-arrival-information>.

Sample Reappointment Letters

Postdoc
Reappointment Letter

POSTDOCTORAL SCHOLAR REAPPOINTMENT LETTER

August 21, 2014

Penelope Postdoc
1432 Vine Street
Berkeley, California 94708

Dear Penelope,

I am pleased to offer you a reappointment as a Postdoctoral Scholar - Employee (3252C) in the Energy Biosciences Institute for the period September 1, 2015 through August 31, 2016. Your full-time (100%) appointment will provide an annual base salary or stipend in the amount of \$47,244 funded by National Cullinary Institute. You will report to Gertrude Ghiradelli as your supervisor and will be located at 354 Stanley Hall. Your research will be focused on: researching chocolate melting points for truffles

Your work will be featured in the annual Cal Day truffle tasting booth.

It is within the University's sole discretion to appoint, reappoint, or not reappoint a Postdoctoral Scholar. This appointment is limited to the dates specified above and is self-terminating unless you are otherwise notified in writing.

Visiting Scholar
Reappointment Letter

VSPA PROGRAM AFFILIATE AUTHORIZATION

I am pleased to provide confirmation that you have been reappointed as a Visiting Scholar in the Visiting Scholar and Postdoc Affairs Program beginning January 1, 2016 and ending May 3, 2016.

As a visiting scholar or visiting student researcher at Berkeley, you are part of a renowned research community that fosters innovative thinking as well as creativity and collaboration across all fields. To this regard, the Visiting Scholar and Postdoc Affairs (VSPA) Program is dedicated to enhancing your research experience at UC Berkeley. The VSPA program offers numerous services to assist you during your stay in Berkeley. To ensure continued access to university services and privileges, you must be in accordance with the VSPA registration requirements. This includes making sure that your University Services Fee is active and that you have health insurance that meets the University of California (UC) System minimum requirements for the duration of your appointment.

The reappointment letter is the same as the initial appointment letter, except the dates reflect the new reappointment period.

PERSONAL DATA

Family Name Middle Name
Birthdate (YYYYMM/DD) Sex: Male Female
Country of Citizenship (Independent Visa Type)
PERMANENT ADDRESS Country City Zip/Postal Code
Street Email Address
Province First Name Middle Name
Telephone Email Address

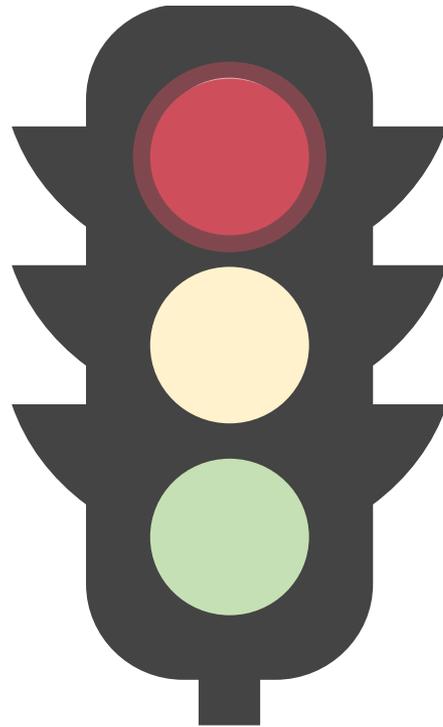
INFORMATION ABOUT YOUR SPOUSE/PARTNER (OPTIONAL)

Family Name Middle Name
Country of Citizenship Date of Degree (YYYYMM/DD)
ACADEMIC INFORMATION
Type of Highest Degree
Institution

Making Changes to Affiliate Applications

CURRENT EMPLOYER

Employer Name Supervisor
City End Date (YYYYMM/DD)
Country Email Address
Phone (Country Code) Fax (Country Code)
Funding Agency



Both the Preparer and the Approver may make changes to the application at any stage in the application process **prior** to approval.

Editing Affiliate Applications

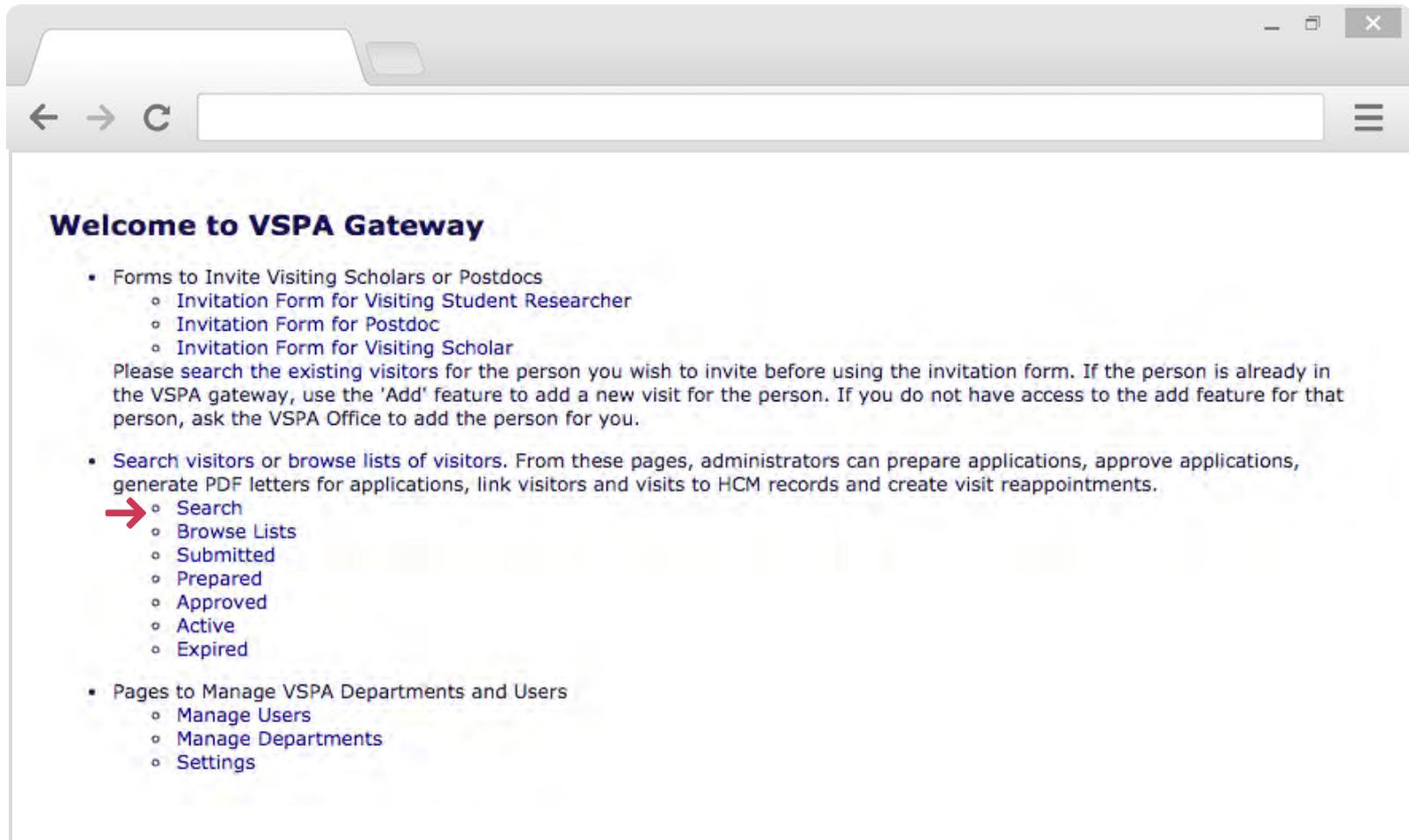
After an application has been approved, changes can only be made by VSPA staff.

If changes need to be made after an application has been approved, Preparers can submit a request to vspa@berkeley.edu.

DO NOT create a duplicate appointment.



Editing Affiliate Applications



The screenshot shows a web browser window with the address bar empty. The page content is as follows:

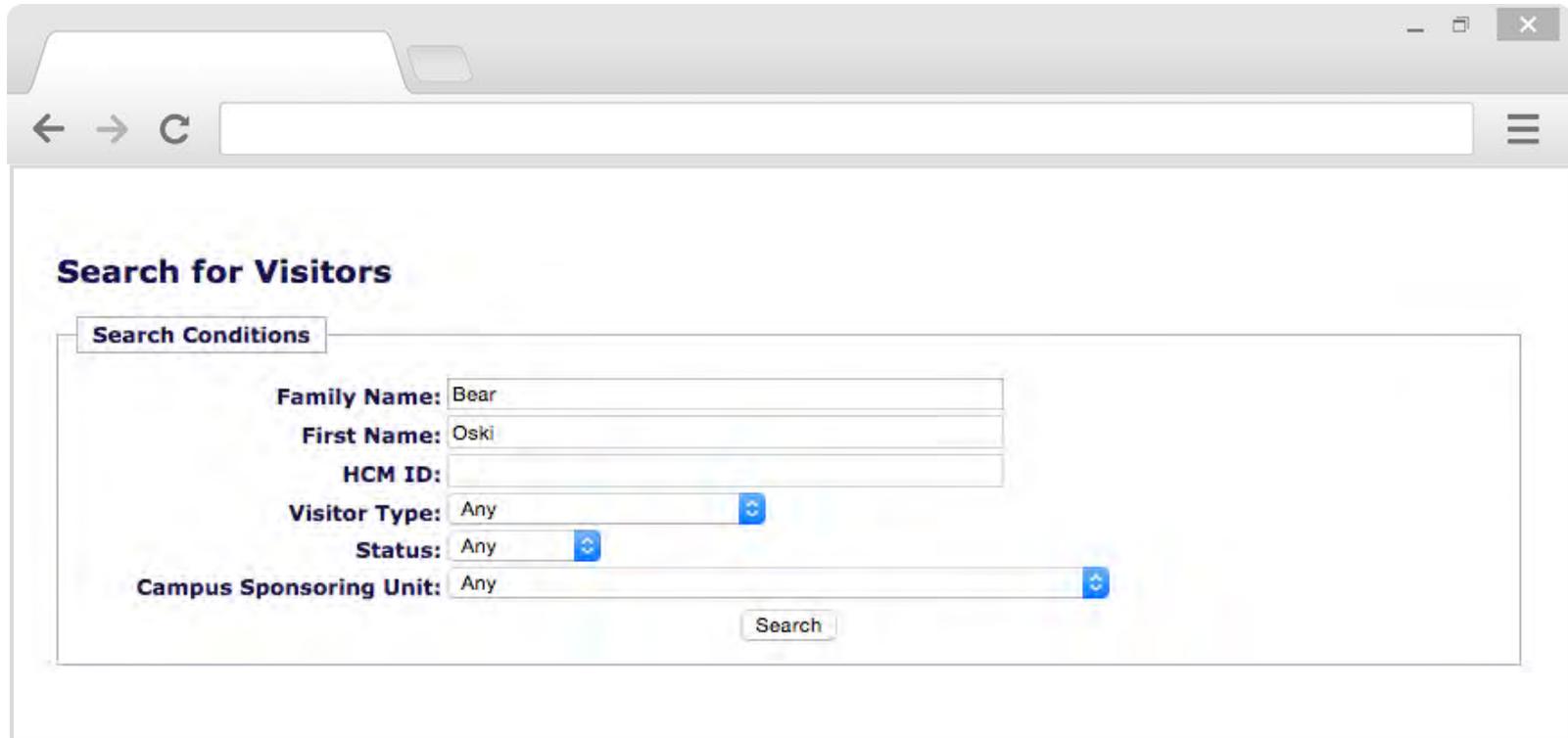
Welcome to VSPA Gateway

- Forms to Invite Visiting Scholars or Postdocs
 - Invitation Form for Visiting Student Researcher
 - Invitation Form for Postdoc
 - Invitation Form for Visiting Scholar

Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the 'Add' feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.
- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
 - ◦ Search
 - Browse Lists
 - Submitted
 - Prepared
 - Approved
 - Active
 - Expired
- Pages to Manage VSPA Departments and Users
 - Manage Users
 - Manage Departments
 - Settings

To make changes to an affiliate's application, you may search for the affiliate in the VSPA Gateway.

Editing Affiliate Applications



The screenshot shows a web browser window with a search form titled "Search for Visitors". The form is enclosed in a box with a tab labeled "Search Conditions". It contains several input fields and dropdown menus:

- Family Name:** Text input field containing "Bear".
- First Name:** Text input field containing "Oski".
- HCM ID:** Text input field, currently empty.
- Visitor Type:** Dropdown menu with "Any" selected.
- Status:** Dropdown menu with "Any" selected.
- Campus Sponsoring Unit:** Dropdown menu with "Any" selected.

A "Search" button is located at the bottom right of the form area.

The search function page allows Preparers/Approvers to search for affiliates in their department by first name, last name, HCM ID, their visitor type (postdoc, visiting scholar, visiting student researcher), or the status of the application (submitted, prepared, approved etc.)

The Campus Sponsoring Unit refers to the sponsoring department of the affiliate.

Search for Visitors

Search Conditions

Family Name:

First Name:

HCM ID:

Visitor Type:

Status:

Campus Sponsoring Unit:

Search Results

| Name | Visit Dates | Prepare | Approve | HCM | Letters | +/- |
|------------|--------------------------------|---------|---------|-----|---------------------|------------|
| Bear, Oski | Sep. 04, 2015 to Dec. 03, 2015 | | | HCM | w VS/VSR1 | Add Remove |
| | Jan. 01, 2016 to May. 03, 2016 | | | HCM | w VS/VSR1 w VS/VSR2 | Add Remove |

Prior to approval, to edit the affiliate's application, click directly on the visit dates corresponding to the application that needs to be corrected.

Show All Information for Visit of Oski Bear

[Click here to get visiting scholar reappointment letter.](#)
[Click here to get visiting scholar reappointment letter in word format.](#)

Control Data

Visitor Type: Visiting Scholar

Standing: In Good Standing

Administrator Notes:

Personal Data

Family Name: Bear

First Name: Oski

Birthdate: Jun. 14, 1989

Sex: Female

Country of Citizenship: USA

Visit Update Information

Creation Date: Jun. 1, 2015 20:25

Last Update Date: Jun. 1, 2015 20:25

Last Modified by: John Jones

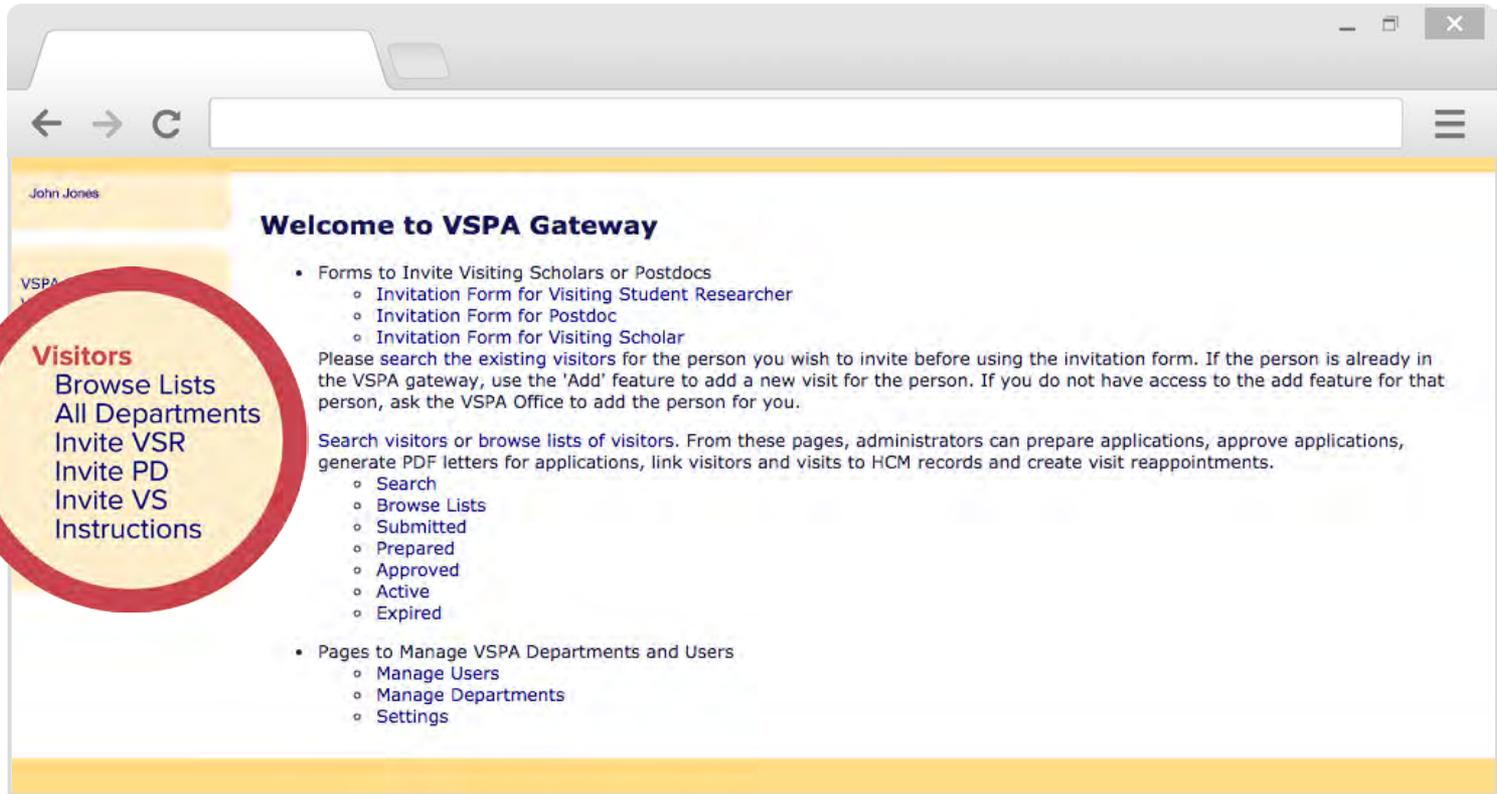
[Edit](#)

Once you have clicked on the appointment dates you will be brought to this page. Click **Edit** button at the bottom of the application to make changes.

REMEMBER TO SAVE

Reappointments

Reappointment



On the departmental VSPA Gateway's home page, click **Visitors** which can be found near the screen's top left corner.

Reappointment

Search for Visitors

Search Conditions

Family Name: bear

First Name: oski

HCM ID:

Visitor Type: Any

Status: Any

Campus Sponsoring Unit: Any

Search

The visitor list screen will appear with a search function to look up the affiliate's existing record.

Reappointment

Search for Visitors

Search Conditions

Family Name: bear
First Name: oski
HCM ID:
Visitor Type: Any
Status: Any
Campus Sponsoring Unit: Any

Search

Search Results

| Name | Visit Dates | Prepare | Approve | HCM | Letters |
|------------|--------------------------------|---------|---------|-----|-----------|
| Bear, Oski | Sep. 04, 2015 to Dec. 03, 2015 | | | HCM | w VS/VSR1 |
| | Jan. 01, 2016 to May. 03, 2016 | | | HCM | w VS/VSR1 |

Add

Once you find the affiliate click **Add**.

If the affiliate's previous appointment is in a department for which you are not a Preparer, email VSPA to temporarily switch their record to your department and add the reappointment.

Once you are finished with the reappointment, notify the VSPA Program to close access to the old record.

Reappointment

The screenshot shows a web browser window with a form titled "Prepare Reappointment for Visit of Oski Bear". The form is divided into three sections: "Preparer", "Control Data", and "Personal Data".

- Preparer:** A text box containing the instruction: "I, as the preparer of the proposed affiliation, have confirmed authorization from the appropriate unit head (chair of department, dean of school, dean of college, director of a ORU) to submit this application." with a checkbox to the right.
- Control Data:** Contains dropdown menus for "Visitor Type" (set to "Visiting Scholar") and "Standing" (set to "In Good Standing"), and a text area for "Administrator Notes".
- Personal Data:** Contains text boxes for "Family Name" (set to "Bear"), "First Name" (set to "Oski"), and "Middle Name". The "Birthdate" is set to "1989 June 14" with "(Year/Month/Day)" text. The "Sex" is set to "Female" with radio buttons for "Male". The "Country of Citizenship" is set to "USA".

The prepare reappointment screen allows you to add the affiliate's new appointment dates and update information.

The reappointment dates cannot overlap with any previous appointment dates for the affiliate.

Reappointment

The screenshot shows a web browser window with a form titled "Reappointment". The form is divided into three main sections:

- Previous Postdoc Experience:** This section contains a text input field for "Institution" with the value "Yale University". Below it are two rows of date pickers: "Begin Date" (2010, January) and "End Date" (2011, January). To the right of the date pickers are the labels "(Year/Month)". At the bottom right of this section are two links: "Delete This" and "Add Another Institution".
- Academic History:** This section contains three fields: "Type of Highest Degree" (PhD), "Date of Degree" (2013, February), and "Institution of Degree" (UC Berkeley). To the right of the degree and date fields are the labels "(or anticipated degree)" and "(or anticipated Year/Month)".
- UC Berkeley Postdoctoral Appointments:** This section contains a single text input field for "Past Postdoc Visits" with the value "Nov. 18, 2015 to Nov. 17, 2016 in Visiting Scholar and Posti".

DO NOT enter Berkeley appointments into the **Previous Postdoc Experience** section.

ONLY enter previous experience at **other** institutions.

Reappointment

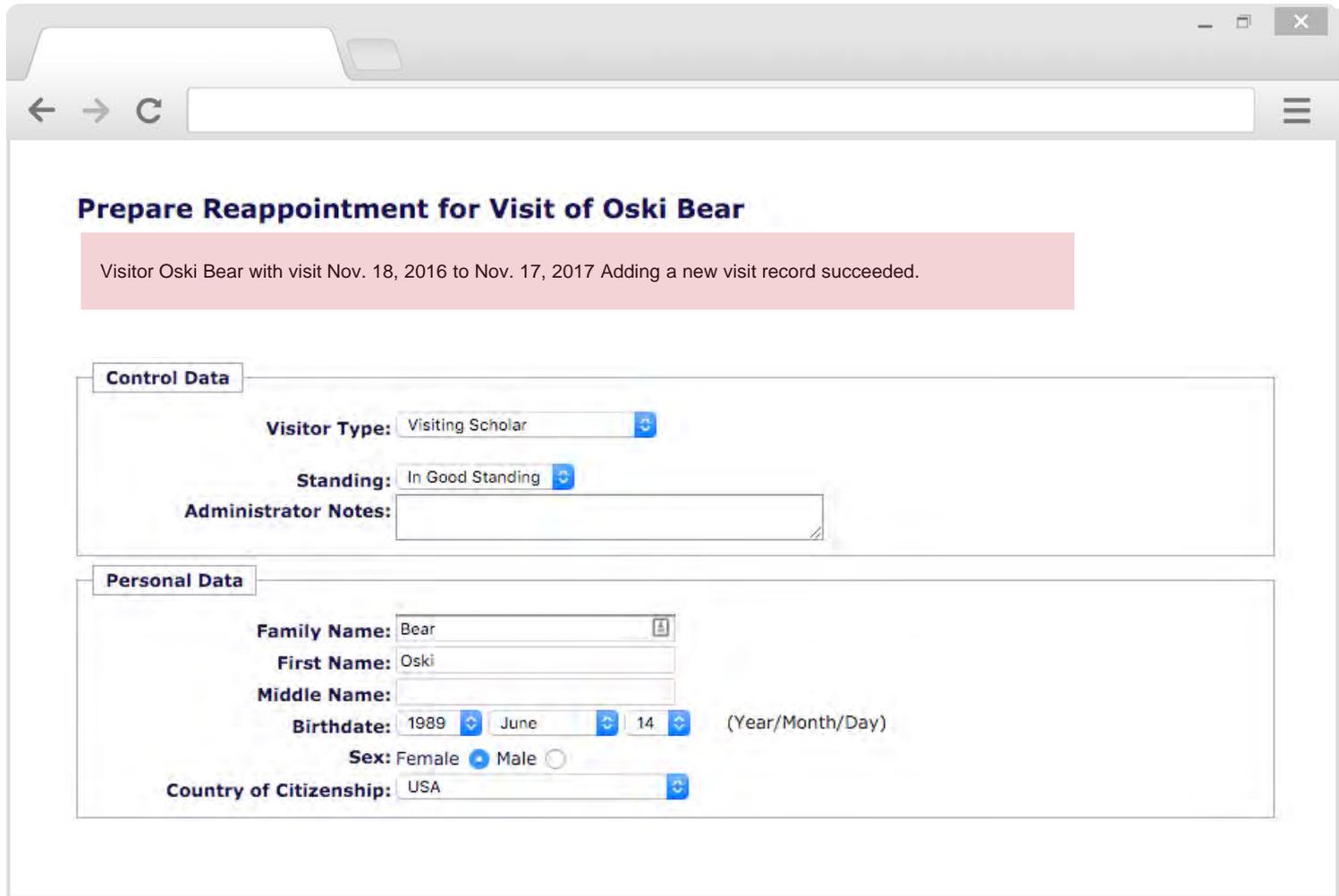
The screenshot shows a web browser window with a form titled "Financial Support While at UC Berkeley". The form is divided into three main sections:

- Financial Support While at UC Berkeley:** This section contains fields for "Primary Funding", "Amount per Month" (set to \$3570.0), "Name of Funding Agency" (Government), "Type of Funding Source" (Federal Govt.), and "Job Code and Title" (3252 - Postdoctoral Scholar - Employee (HE)). A link "Add Supplementary Funding Source" is located at the bottom right of this section.
- Financial Support Funding Documents:** This section includes a note: "Postdoctoral Scholar Paid Direct (code 3254) must submit funding documents. PDF and MS Word document formats accepted." Below this is a "Funding Document" field with a "Choose File" button and the text "No file chosen".
- Users to Send Email Notices:** This section has a "Use All Default Users" checkbox (unchecked) and a "Select Users" list box. The list box contains the following names and roles: Aridomi, Haruna Amy (Administrator), CASTANEDA, Sam (Administrator), Flores, Susana E (Administrator), Kuo, Yu-Tin (Administrator), LUMSEY, Cassandra (Preparer), Lim, Lizette J. (Administrator), MAYS, Laura L. (Approver, Preparer), and Jones, John (Preparer).

At the bottom of the form, there is a button labeled "Create Reappointment and Prepare" with a red arrow pointing to it from the right.

After entering the required information, you will be prompted to create the reappointment.

Reappointment



Prepare Reappointment for Visit of Oski Bear

Visitor Oski Bear with visit Nov. 18, 2016 to Nov. 17, 2017 Adding a new visit record succeeded.

Control Data

Visitor Type: Visiting Scholar

Standing: In Good Standing

Administrator Notes:

Personal Data

Family Name: Bear

First Name: Oski

Middle Name:

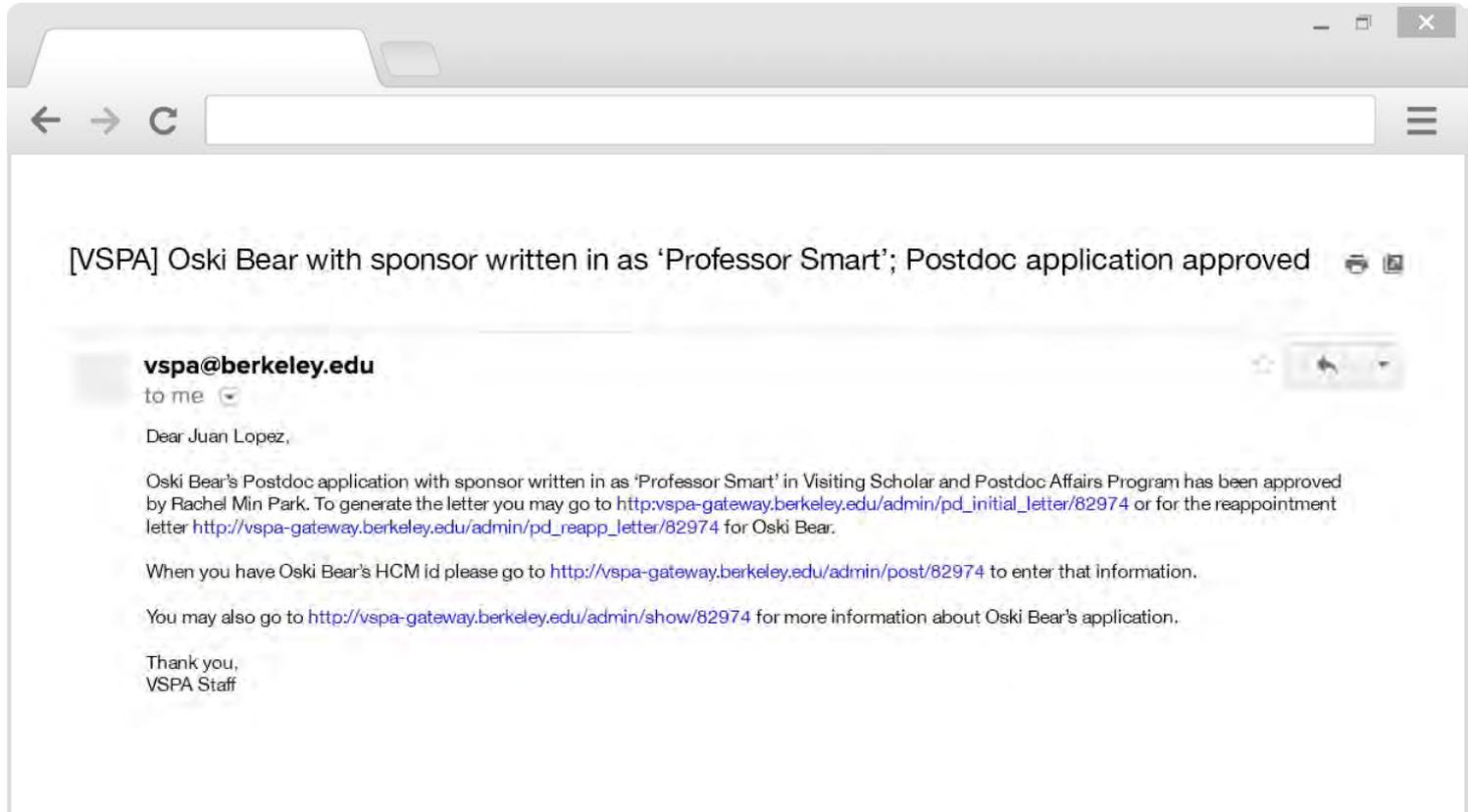
Birthdate: 1989 June 14 (Year/Month/Day)

Sex: Female Male

Country of Citizenship: USA

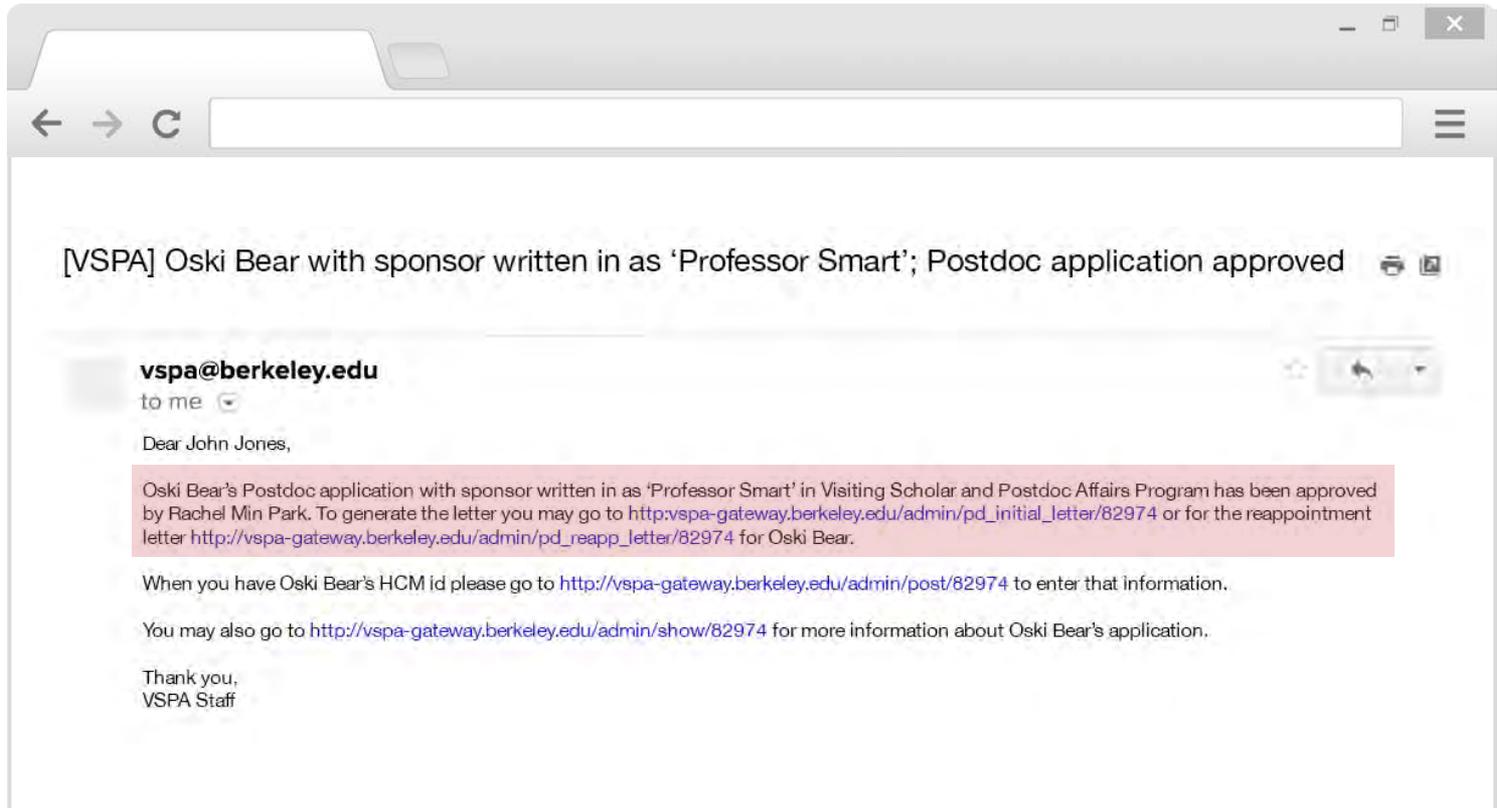
After successfully creating a reappointment, you will be taken to this screen.

Reappointment



An e-mail will be sent to the Approver and to any other users selected about the application ready to be reviewed for approval.

Reappointment



Once the reappointment has been approved, an email notification will be sent.

The e-mail will have links to both the initial approval letter and the reappointment letter.

Reappointment

Search Results

| Name | Visit Dates | Prepare | Approve | HCM | Letters | +/- | |
|-----------------|--------------------------------|---------|---------|-----|-------------|-----|--------|
| Postdoc, Poesie | Nov. 18, 2015 to Nov. 17, 2016 | | | HCM | w PD1 | Add | Remove |
| | Nov. 18, 2016 to Nov. 17, 2017 | | | HCM | w PD1 w PD2 | Add | Remove |

Search Results

| Name | Visit Dates | Prepare | Approve | HCM | Letters | +/- | |
|------------|--------------------------------|---------|---------|-----|---------------------|-----|--------|
| Bear, Oski | Sep. 04, 2015 to Dec. 03, 2015 | | | HCM | w VS/VSR1 | Add | Remove |
| | Jan. 01, 2016 to May. 03, 2016 | | | HCM | w VS/VSR1 w VS/VSR2 | Add | Remove |

Reappointment letters can also be obtained by searching for the visitor and then clicking **PD2** or **VS/VSR2**.

Reminder

The **Invite** function is only for **new** VSPA affiliates.

For any affiliate that has an existing record, regardless of a break in dates or a change in department, the **Add** function must be used.

New Features of the VSPA Gateway

Reports

John Jones

Welcome to VSPA Gateway

- Forms to Invite Visiting Scholars or Postdocs
 - Invitation Form for Visiting Student Researcher
 - Invitation Form for Postdoc
 - Invitation Form for Visiting Scholar

Please search the existing visitors for the person you wish to invite before using the invitation form. If the person is already in the VSPA gateway, use the 'Add' feature to add a new visit for the person. If you do not have access to the add feature for that person, ask the VSPA Office to add the person for you.

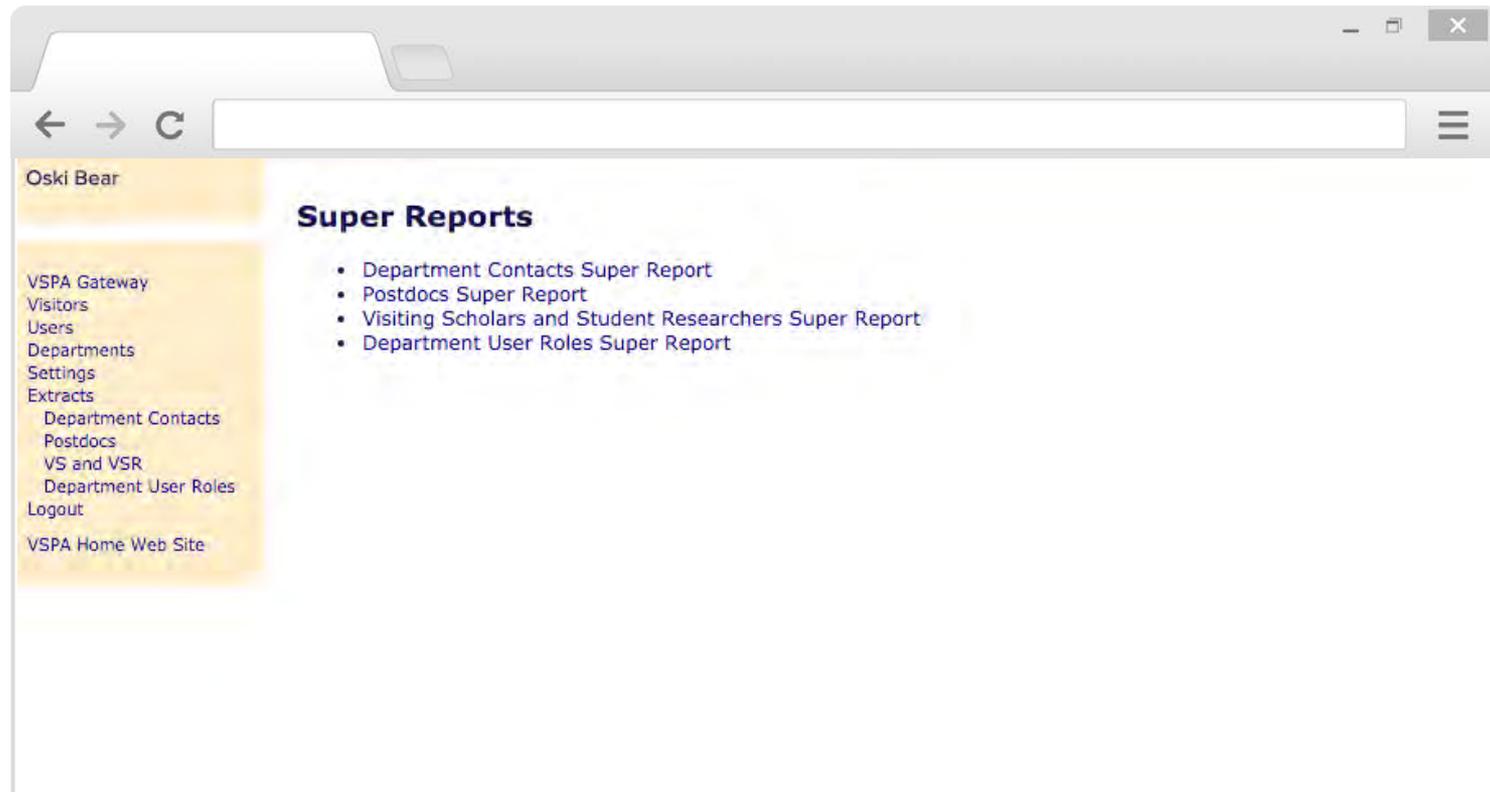
- Search visitors or browse lists of visitors. From these pages, administrators can prepare applications, approve applications, generate PDF letters for applications, link visitors and visits to HCM records and create visit reappointments.
 - Search
 - Browse Lists
 - Submitted
 - Prepared
 - Approved
 - Active
 - Expired
- Pages to Manage VSPA Departments and Users
 - Manage Users
 - Manage Departments
 - Settings

VSPA Gateway
Visitors

Users
Departments
Settings
Extracts
Logout

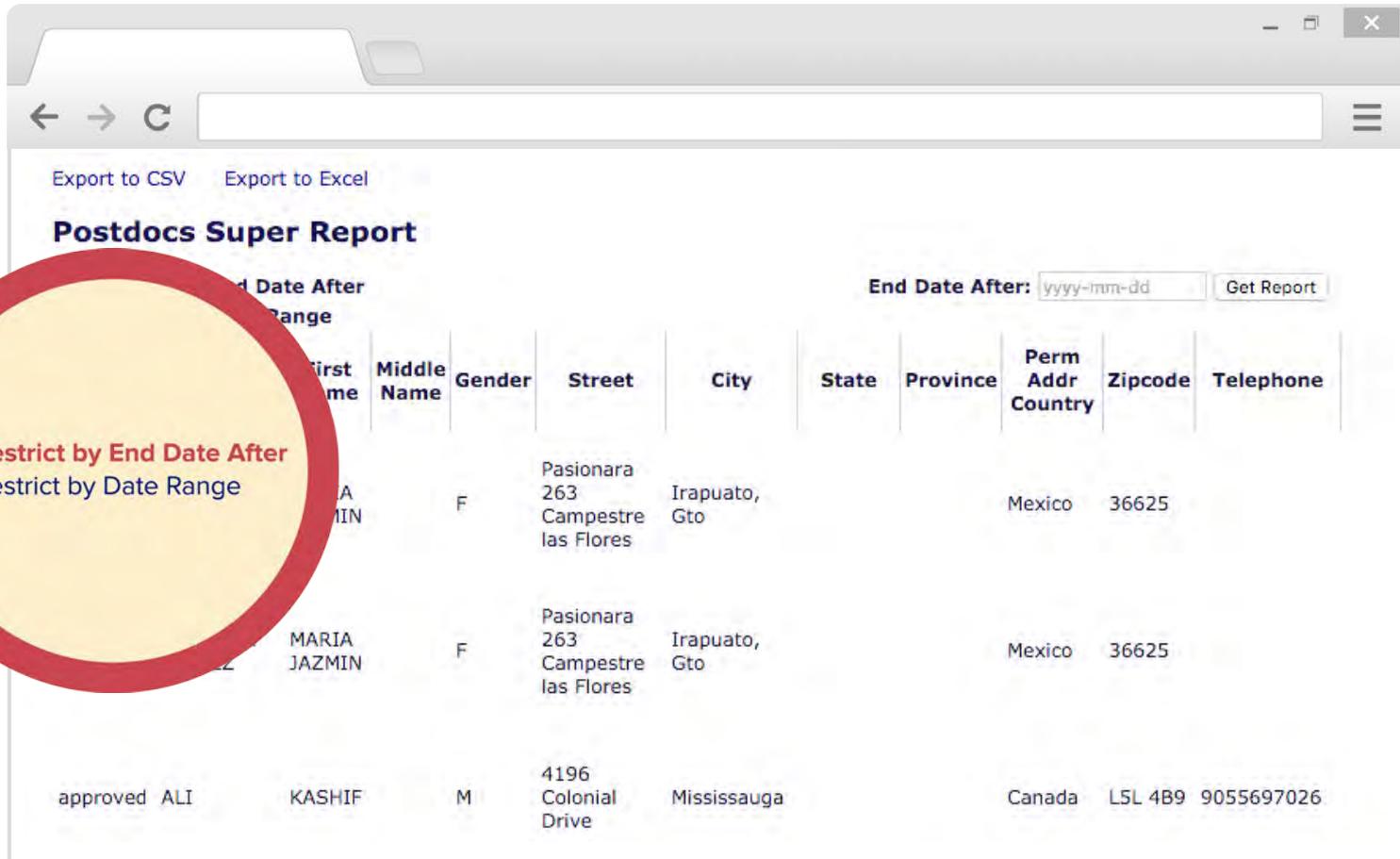
Administrators can now pool data from affiliates and their Gateway records by going to **Extracts**.

Reports



The **Super Report** collects information from all postdocs or visiting scholars and visiting student researchers in the VSPA Gateway only in the departments that you have access to.

Reports



Export to CSV Export to Excel

Postdocs Super Report

End Date After:

| First Name | Middle Name | Gender | Street | City | State | Province | Perm Addr Country | Zipcode | Telephone |
|--------------|-------------|--------|------------------------------------|---------------|-------|----------|-------------------|---------|------------|
| ALIA | JAZMIN | F | Pasionara 263 Campestre las Flores | Irapuato, Gto | | | Mexico | 36625 | |
| MARIA | JAZMIN | F | Pasionara 263 Campestre las Flores | Irapuato, Gto | | | Mexico | 36625 | |
| approved ALI | KASHIF | M | 4196 Colonial Drive | Mississauga | | | Canada | L5L 4B9 | 9055697026 |

- Restrict by End Date After
- Restrict by Date Range

Limit or refine your search by picking an appointment end date.

The process for pooling data for visiting scholars and visiting student researchers is the same as for postdocs.

Reports

Export to CSV Export to Excel

Postdocs Super Report

Restrict by End Date After End Date After: Get Report

Restrict by Date Range

Export to CSV Export to Excel

Postdocs Super Report

Restrict by End Date After From Begin Date To End Date Get Report

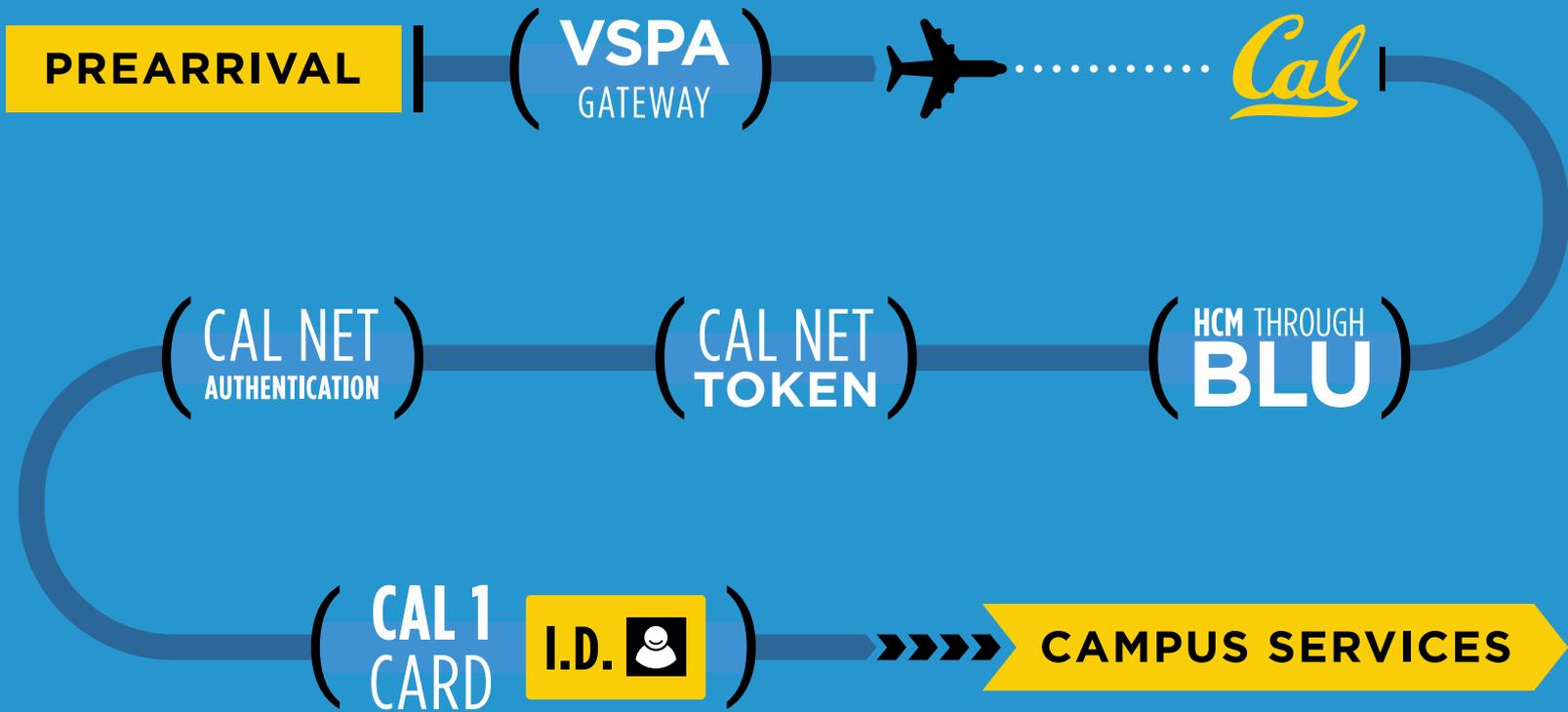
Restrict by Date Range

Picking an end date will give you all the postdoc records that have appointment end dates AFTER 2015-01-01.

Picking a range of dates will give you all the postdoc records that have appointments in between the dates you have chosen.

Post-Arrival Process

IDENTITY & CAMPUS SERVICE ACCESS



Post-Arrival At-A-Glance

Step 1

On-Boarding

*For **ALL** Affiliates*

Affiliate arrives and is on-boarded at CSS

Department or CSS creates HCM record

Department or CSS adds HCM Employee ID number into VSPA Gateway record

Affiliates' start dates **MUST** match their DS-2019. Earlier start dates are not permitted unless the DS-2019 is corrected.

Step 2

University Services Fee Payment

*Required **ONLY** for Visiting Scholars and Visiting Student Researchers*

Affiliate or sponsoring department pays the \$500 University Services Fee after the HCM record has been created

VSPA creates a Person of Interest (POI) relationship in HCM

Affiliate can obtain Cal 1 ID card one business day after the fee is processed

Postdocs are not required to pay the USF.

HCM Reporting

Search Results

| Name | Visit Dates | Prepare | Approve | HCM | Letters | +/- | |
|------------|--------------------------------|---------|---------|-----|-----------|-----|--------|
| Oski, Bear | Aug. 03, 2015 to Dec. 08, 2015 | | | HCM | w VS/VSR1 | Add | Remove |

HCM Information

HCM ID:

Users to Send Email Notices

Use All Default Users: False

Select Users: Park, Rachel Min (Administrator, Preparer)

Once an HCM record has been created for an affiliate, enter their HCM ID number by searching their name and clicking on **HCM**.

Enter the HCM ID in the section for HCM Information and press **Save**

VSPA Gateway Help Desk



HOURS Monday-Friday
9am to 4pm



CALL +1 (510) 643-9681



EMAIL vspa@berkeley.edu





Congratulations!



YOU ARE NOW PREPARED TO USE THE VSPA GATEWAY



BEAR

HUG

