ERE
Policies and Procedures Workshop
Agenda

- ERE administration
- CAP Profiles
- Degree Program Overview
- Travel and Reimbursement
- Purchasing
- Mail and Office Space
- Recruiting and Events

Note: This presentation provides an overview of detailed policies and procedures from the Stanford Bulletin and ERE Student Handbook. These source references should be consulted for any clarification and before taking any degree program actions.
ERE Administration

ERE Administration collaborates with students, faculty, and research staff in pursuing the department’s academic goals. The office provides services and resources on policies and procedures regarding academic programs, research, funding, admissions, and recruiting.
Research Group Administration

Director
Sandy Costa

Student Services
Arlene Abucay
Diane Cisneroz
Joanna Sun

IT
Eric Liu

Yolanda Banks
Stephanie James
Samantha Mickens
Thuy Nguyen
Lyrissa Roman
Stanford Profile System (formerly CAP)

- University-wide profile system ([https://profiles.stanford.edu/](https://profiles.stanford.edu/))

- Profile categories: contact info, lab affiliations, education, work experience, current research, publications, and more.

- Maintain your profile in ONE place - Stanford Profiles System automatically feeds your entries into other websites.

Your Responsibility!

Your CAP profile entries

- School of Earth, Energy & Environmental Sciences website
- ERE website
- Your research group website (some groups)

- More about CAP: [https://cap.stanford.edu/](https://cap.stanford.edu/) or profiles.stanford.edu
- More about Personal sites: [https://uit.stanford.edu/guide/website/personal](https://uit.stanford.edu/guide/website/personal)
Degree Requirements

MS and PhD

- Research and Teaching Assistantships
- Course Requirements
- Milestones
Degree Requirements

- 135 units of coursework required for the PhD; 45 units for MS
  - At least 90 Stanford units dedicated exclusively to the PhD
  - Additional 45 units from prior advanced degree or coursework, or while at Stanford (PhD)
- All students must complete a course list (Program Proposal for MS first quarter; Candidacy for PhD after qualifying exam fourth quarter)
- All required courses must be taken for a letter grade
PhD Milestones

- Qualifying Exam
  - During 4th quarter: part one is a written exam, and part two is an oral exam with committee of 3 faculty members (includes primary advisor)
  - Determines additional training needs and readiness for dissertation research
- Advance to Candidacy
  - Acknowledges potential to complete the degree requirements
  - Occurs after passing the qualifying exam
- Dissertation Reading Committee
  - Comprised of at least 3 faculty readers (includes primary dissertation advisor)
  - Readers can be from outside of ERE
  - One reader can be from outside of Stanford, but must hold a PhD and be approved by the chair
- Oral Exam
  - Tests command of field and confirms fitness for scholarly pursuits
  - Defense of your dissertation
- Dissertation submission

MS Milestones

- Program Proposal
  - During 1st quarter consult advisor on course plan
  - Determines additional training needs and readiness for research
- MS Thesis
Transfer Credits for PhD

- Refers to **graduate** courses taken at another institution (i.e., outside of Stanford).

- Up to 45 quarter units of previous graduate work from accredited institution outside of Stanford or previously completed at Stanford may apply toward your 135 units.

- One semester unit equals 1.5 quarter units
  - E.g.: 4 semester units = 6 quarter units

- At least 33 of the 45 quarter units should be equivalent to Stanford courses (exact match not required)
  - 12 quarter units can be “non-parallel” credit, which includes:
    - Courses without Stanford equivalents
    - Research or thesis courses
    - Independent study courses

- Typically students transfer in units after the qualifying exam.

*MS students are not eligible to transfer in credits*
Enrollment

- 10 units each quarter of regular academic year (fall, winter, and spring)
- Students must enroll in at least 8 units to be in full-time student status, regardless of visa status
- Focus on Area and field of concentration courses
- MS Students should enroll in Energy 361 for research units
- PhD students should enroll in Energy 363 for research units
- Energy 801/802 is only for students in TGR status (this is a special registration status once student complete all of their course and unit requirements). Please do not enroll in 801 or 802 unless you’ve been approved for TGR.
TGR (Terminal Graduate Registration)*

- This is a special status for students who have satisfied the unit and course requirements.
- MS students must have at least 45 units on the transcript; PhD students must have at least 135 and reading committee.
- Students must file for TGR the quarter prior to TGR quarter (if you want to advance to TGR in winter, you must file in autumn).
- Students in TGR status are no longer enrolling in courses, only Energy 801 (for MS) or 802 (for PhD) for zero units.
- Graduate tuition drops to about 1/3 of the regular tuition rate.

Grad Quarter Registration*

This is another special status for students who only needs to complete the thesis in order to graduate. Students may petition for grad quarter only once (in the last quarter of program) if all course/unit and milestone requirements are satisfied. Tuition for grad quarter drops down to $150. Petition must be filed the quarter prior to grad quarter status.

*Both TGR and Grad Quarter status require petition and approval from the registrar. Please see me when you are ready to advance.
Department Funding

- Covers 10 units of tuition and a salary stipend for Autumn, Winter, Spring
- Pay Periods: Autumn 10/1-12/31; Winter 1/1-3/30; Spring 4/1-6/30
- Students are paid twice a month on 22\textsuperscript{nd} (for first day of month to 15\textsuperscript{th}) and 7\textsuperscript{th} (for 16\textsuperscript{th} to last day of the month)
- Please refer to fingate.stanford.edu if you have specific payroll or tax questions
- Students are responsible to monitor their own bill and to make sure that payments are posted by the University deadline
Pop Quiz!!!

How many units are required for a PhD degree?
MS degree?
Travel & Reimbursement

2 Important Documents available on Current Student Resources webpage:
More Info: https://pangea.stanford.edu/ere/current-student-resources

1. ERE Travel Certification and Fund Application Form (2 pages)
2. ERE Expense Report Form

Pay special attention to the following points, which are required for reimbursement processing:

BEFORE making travel arrangements:
- Read carefully about which expenses are reimbursable and which are not.
  More info: https://web.stanford.edu/group/fms/fingate/staff/reimburse/permissible_exp.html
- Submit the ERE Travel Certification and Fund Application Form (research associates only need to fill out the fund application on page 2) to Yolanda or Thuy. Once you have their signature, you can make your travel arrangements.

DURING your trip:
- Keep receipts for all reimbursable expenses. Receipts must show method of payment.

AFTER you travel:
- Use the new Expense Report Form to record all of your expenses.
- Submit the Expense Report Form and the required documents/receipts to Sam or Lyrissa to request your reimbursement.
Travel & Reimbursement

**Business Meals:**
- Expense Guide for Business Travel available online
  (We will reimburse up to 20% tip)
- Include the names of anyone in attendance

<table>
<thead>
<tr>
<th>Meals</th>
<th>Suggested Maximum Amount Per Person (Including tax, tip and alcohol)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>$12-20</td>
</tr>
<tr>
<td>Lunch</td>
<td>$18-35</td>
</tr>
<tr>
<td>Dinner</td>
<td>$36-80</td>
</tr>
</tbody>
</table>
Car Rental Info:
It is recommended that you use public transportation such as (shuttle, taxi, Uber, Lyft, etc) whenever possible to reduce costs.

DO NOT ELECT additional car rental insurance within the continental United States. The University self-insures against risk for all employees and students who rent a car from any agency while on University business within the continental U.S.

Travelers should DECLINE all additional insurance coverage, including:
- Loss Damage Waiver (LDW)
- Collision Damage Waiver (CDW)
- Personal Accident Insurance (PAI)
- Personal Effects Coverage
- Liability Coverage
- No expense for car rental insurance will be paid by the University except when renting in a foreign country or Hawaii. Travelers should accept additional car rental insurance in foreign countries and Hawaii
Important Info and Tips to Expedite Reimbursement:

1. Reimbursements submitted more than 60 days after activity or travel may be taxed.

2. Scan copies of your Travel Certification and Fund Application Form, Certification for Student Travel, Expense Report Fund and all receipts and email them to your designated Administrative Associate.

3. All receipts should contain date, vendor name, itemized listing and payment method.

4. Stanford does not reimburse students for alcohol. If a meal contains alcohol, ask for a separate receipt. If a receipt contains any alcohol, ensure that the receipt is itemized, shows the tip, and tax amounts.

5. Room service can be difficult to reimburse, because it doesn’t usually have an itemized list of what was ordered.

6. The school will only reimburse tips of up to 20% of the subtotal.

7. List the names of anyone you have paid for on a single receipt along with their title and company name.

8. Always select the cheapest rates for airfare or lodging. If you purchase an expensive flight or lodging, ask for preapproval, screenshot comparisons as proof that you have done your best to select a reasonable fare.

9. Additional travel insurance is not reimbursable unless required as a part of visa application or working as visitor. More Info: https://web.stanford.edu/group/fms/fingate/faculty/travel/air.html
Pop Quiz!!!

Is travel insurance reimbursable?
**Purchasing Card (P-Card) Use:**
Follow the steps below. No form is required. Send an email to Yolanda or Thuy describing your purchasing needs (item, price, supplier, purpose).

**After** you get their approval, check out Stephanie’s P-Card. Send the receipt to Stephanie immediately after purchase.

Note: For long-term lab projects requiring frequent purchases, talk to Yolanda or Thuy about different procedures which may work better for you.

If you have any questions about the processes or policies, please contact:
Yolanda (room 095) – yolandad@stanford.edu
Thuy (room 095) – ttnguyen@stanford.edu
Stephanie (room 019) – smathewsjames@stanford.edu
Purchasing

Purchasing -- Two Methods to Purchase (under $5,000)
- Please send an email to Yolanda or Thuy with your requested items before checking out the purchasing card from Stephanie to purchase lab supplies, office supplies, or other items related to your research (anything not travel related)
- If a vendor will not accept the credit card, get a written quote from vendor for the item(s) and submit to Stephanie. Stephanie will do a purchase order for payment.
- Receipts are required for all purchases. Either bring them back with the purchasing card or email them to Stephanie (smathewsjames@stanford.edu) but let her know that this is the method that you will be using to give her the receipts.

Purchasing ($5,000 and over)
- Any purchases $5,000 and above require a Purchase Order. Requests will need to go through Thuy or Yolanda for review and approval. They will submit a request to Stanford’s Procurement Dept to generate a Purchase Order.
Pop Quiz!!

When do you need to submit the travel fund request? Before or After your trip?
Packages, Mail, Office Space, Repair, and Room Requests

- **Packages**
  - Please refrain from having personal packages sent to the Department.
  - Once department related packages arrive, you will receive email notification.
  - ***Boxes and packaging must be disposed of in recycling center behind the Green or Mitchell Buildings***

- **Mail**
  - Student, Post Docs, Research Associates and Visitor Mailboxes are in 060
  - Faculty and Staff mailboxes are in 050.

- **Offices/Keys/Repair/Room Requests**
  - All students will have one office key assigned to them. Students in Mitchell can also have a room B02 key for color printer access.
    - Each key requires a $10 deposit, if key is lost, the dept charges $10.
    - Key deposits will be refunded when keys are returned.
  - Requests to change offices must be approved by Sandy. Space is limited, especially during fall quarter. 1st priority in Green is given to PhD students and lab-based MS students.
  - Email all office repair requests to Diane at dlarsonc@stanford.edu for processing. Include building and room number, and detailed information about the issue.
  - Email room reservation requests to Diane if you are a TA. All other room reservations can be self-made online at 25Live.
Copy/Mail/Printer/Coffee Room

Copy/Mail/Printer/Coffee Room – Green 060

- General Office Supplies. Please contact Diane for anything specific needed
- Student, Post Docs, Research Associates and Visitor Mailboxes
- Computer for Printing Use
- One B/W Printer, One Color Printer
- Printer Issues:
  - Toner replacement - Contact Diane
  - All other technical issues - Contact Eric Liu
- Coffee/Tea – Coffee and tea are located in containers next to the coffee machine.
- Dollies and Carts
  - To be used and returned to room 60 right away.
- Photocopier
  - Also scans, emails and faxes
  - Must have copy code to use (Diane emails individual codes)
- Please help keep the Copy Room clean!
  - Paper should be put into recycle or shredder bins
  - Coffee/tea spills need to be wiped up and pods recycled in the green bin. Please be courteous and leave supplies such as staplers, 3 hole punch, scissors, tape dispenser and such in rm 60.
  - NEED INFO ON MITCHELL PRINTERS AND VOLUNTEERS!!!
Pop Quiz!!!

Who do you contact for office issues?
Event Protocol

- Guests first in meal lines.
- Take one serving, to ensure that there is enough food for all attendees.
- Leave the vegetarian options for the vegetarians.
- If the event is hosted by another research group or Department, wait until you are invited to take food. If you are not invited, ask before taking.
- Clean up after yourself. Trash and recycling bins are always provided.
ERE Fall Recruiting

• Check with your advisor!

• Attend the info sessions

• Maintain professionalism & high ethical standards in your interviewing/negotiating

• Regard on-campus interviews like any other interview

• Open to other companies participating in fall recruiting, connect ME! 😊
General Etiquette & ERE Safe Space

General expectations for respectful behavior:

- Respect others values and beliefs, even if they differ from yours.
- When planning an event or outing, try to be inclusive.
- Be respectful to your officemates.
ERE Community
Additional Resources

ERE Forms and Student Handbook
[https://earth.stanford.edu/ere/current-student-resources](https://earth.stanford.edu/ere/current-student-resources)

Graduate Academic Policies and Procedures
[http://gap.stanford.edu](http://gap.stanford.edu)

University Student Affairs (Registrar’s office forms)
[http://studentaffairs.stanford.edu/registrar/forms/grad](http://studentaffairs.stanford.edu/registrar/forms/grad)

Vice Provost for Graduate Education
[https://vpge.stanford.edu/gradgateway](https://vpge.stanford.edu/gradgateway)

Bechtel International

Title IX Office
[https://titleix.stanford.edu/](https://titleix.stanford.edu/)

Wellness Network at Stanford
[https://wellness.stanford.edu/](https://wellness.stanford.edu/)