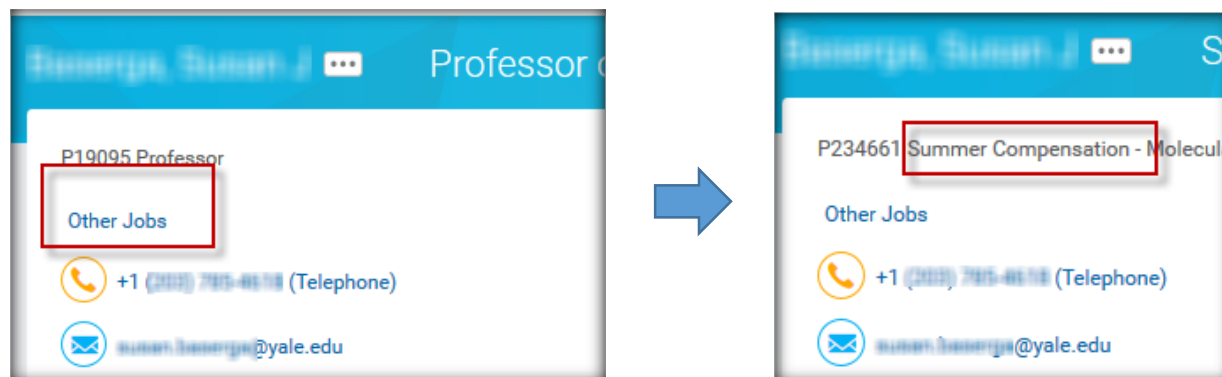# Instructions for adding a Summer Compensation Job in Workday

1. Search for the faculty member in Workday. If there is a link to "**Other Jobs**" just below the Position #, click on the link to verify that it is for the Summer Compensation job. If so, you will not need to add a Summer Compensation job. If you do not see a link to "Other Jobs", you will need to add one.



2. To the right of the faculty member's name, click on the Related Actions button, hover over Job Change, then select **Add Job**.
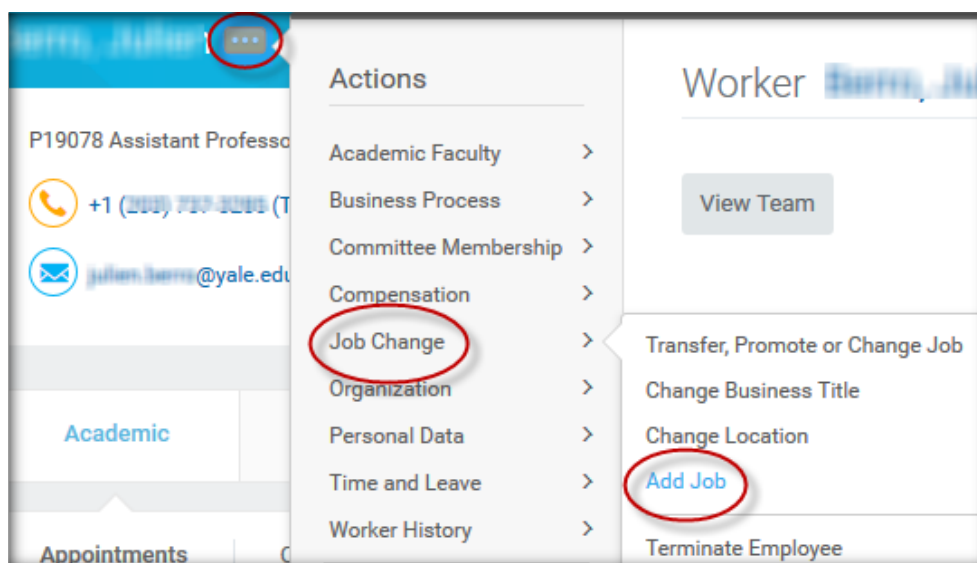


3. In the next window that appears, search for the Summer Compensation organization for your department chair. It will have the naming convention of "**Summer Compensation –**", followed by the name of your department, then followed by the name of your chair in parenthesis.
    a. If a summer compensation organization does not exist for your chair, it will need to be created. Ask your operations manager to submit the request to Employee Services.
    b. If the Supervisory Organization field is populated with your organization upon opening this window, you will need to clear it out by clicking on the "X".
    Click **Submit**.

4. Follow the example to the right. The only items that will change with each specific case are as follows:
   - The date should be the current date or one in the past. DO NOT enter a <u>future</u> date.
   - Your department location.

Click Additional Details.

   - **Copy** the name of the organization that is in the banner at the top of the page (**Summer Compensation plus the department name**) **and paste** it into the **Job Title** field.

Click **Submit**, then click **Done**.

You should now see the "Other Jobs" link under the position number, and you may begin paying summer compensation to this faculty member.

| Effective Date * | 04 / 15 / 2016 |
| Reason * | ✕ Add Additional Employee Job > New Assignment > Summer Compensation Assignment |

## Job Details

| Employee Type | * | ✕ Faculty |
| Job Profile | * | ✕ Summer Compensation |
| Time Type | * | ✕ Full time |
| Location | * | ✕ Whitney Ave, 221 |
| Work Space | | |
| Pay Rate Type | | ✕ Salary |
| Scheduled Weekly Hours | | 40 |

### ⌄ Additional Details

| Job Title | Summer Compensation - English |
| Business Title | Summer Compensation - English |

The summer compensation job for the faculty member only needs to be created once and will remain for future summers.

# Instructions for adding summer compensation in Workday

1.  Search for the faculty member in Workday.

2.  To the right of the faculty member's name, click on the Related Actions button, hover over Compensation, then select **Manage Period Activity Pay Assignments**.
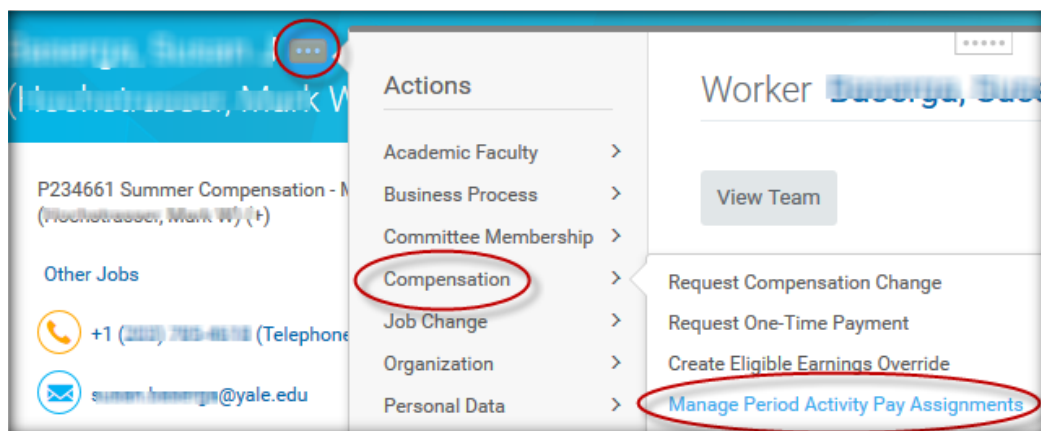
3.  On the "Manage Period Activity Pay Assignments" page, **select the summer compensation position**.

4.  **Academic Period**: Select the period for the payment that you are about to enter. The period can be a specific month, or you may select the Multi Month option if it will occur over more than one month (see options below).

5.  **Period Activity Rate Matrix**: Select **Yale Period Activity Pay**.

6.  **All Activities**: Select the category that is most applicable to the transaction.

    a.  If any part of the payment is charged to an NIH grant, select **NIH**.

    b.  If any part of the payment is charged to a grant other than NIH, select **Other Sponsored Awards**.
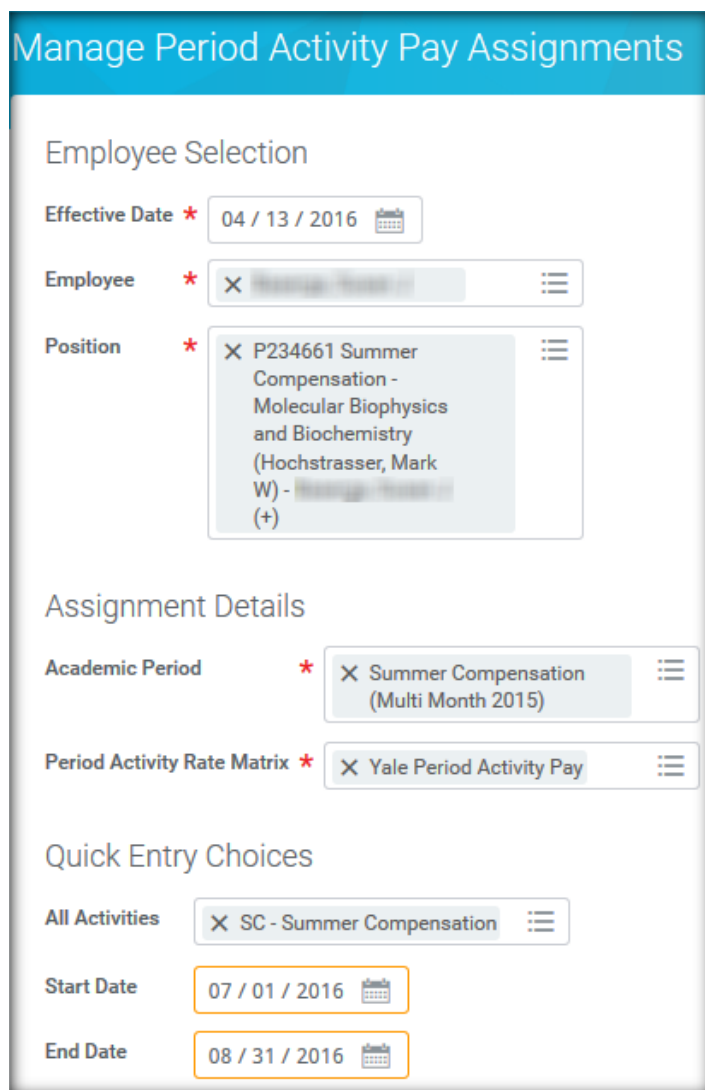
    c.  **Summer Session** is only used by that office for Summer Programs payments.

    d.  **OIA** and **AYA** are only for payments from those offices.

    e.  All other payments can go under **Summer Compensation.**

7.  **Start and End Dates:** Must be the **first and last day** of the payroll cycle for this transaction.

8.  Click **OK**.

| Position | P234661 Summer Compensation - Molecular Biophysics and Biochemistry (Hochstrasser, Mark W) - Baserga, Susan J (+) |
| --- | --- |
| Academic Period ★ | Summer Compensation (Multi Month 2015) |
| Rate Matrix | Yale Period Activity Pay |
| Reason ★ | ✕ Period Activity > New Assignment > Summer Compensation Assignment ☰ |

9. **Reason**: Select the only option available, **Period Activity > New Assignment > Summer Compensation Assignment**.

10. The activity and date information that you entered on the previous screen now appear below. Verify that the information is correct.

11. **Comment**: Briefly describe the activity, e.g. research, summer course, Global Scholars Program, etc.

12. **Total Amount:** In the Compensation Section, enter the total amount of the Summer Compensation payment. This must match the amount to be paid on the Summer Compensation Form.

13. Click **Submit**.

| *Activity | |
| --- | --- |
| Activity ★ | ✕ SC - Summer Compensation ☰ |
| Task | ☰ |
| Comment | |
| | Expand |

| *Compensation | | |
| --- | --- | --- |
| Total Amount ★ | 1.00 | Start Date |
| Currency | USD | End Date |
| | | Do Not Pa |

**Academic Period options (item 4 above):**

← 2016

○ Summer Compensation (May 2016)

○ Summer Compensation (Multi-month 2016)

○ Summer Compensation (June 2016)

○ Summer Compensation (July 2016)

○ Summer Compensation (August 2016)

○ Summer Compensation (September 2016)

search ☰

## Procedures for instructors who teach in Summer Session

Some faculty who are being hired to teach in the Summer Session will need to be transferred to Summer Session and hired as Teacher Summer Programs.  This only applies to faculty in the following categories:

- Part-time faculty who only teach during the academic year, i.e. August or September through May

- Full-time, multi-year, non-tenured faculty who are resigning from Yale effective June 30, 2016.

The Office of Summer Session in consultation with the Provost's Office will determine which faculty will need to be transferred.  Then, a representative from Summer Session will contact the relevant department administrators to coordinate the transfer.

Note:  A similar transfer will need to happen at the end of the summer if the faculty member is rehired. It is best to coordinate these arrangements at the time of the transfer to Summer Session.

## Workday Instructions for Transfer

1. Search for the faculty member in Workday.

2. To the right of the faculty member's name, click on the Related Actions button, hover over Job Change, then select **Transfer, Promote, or Change Job.**
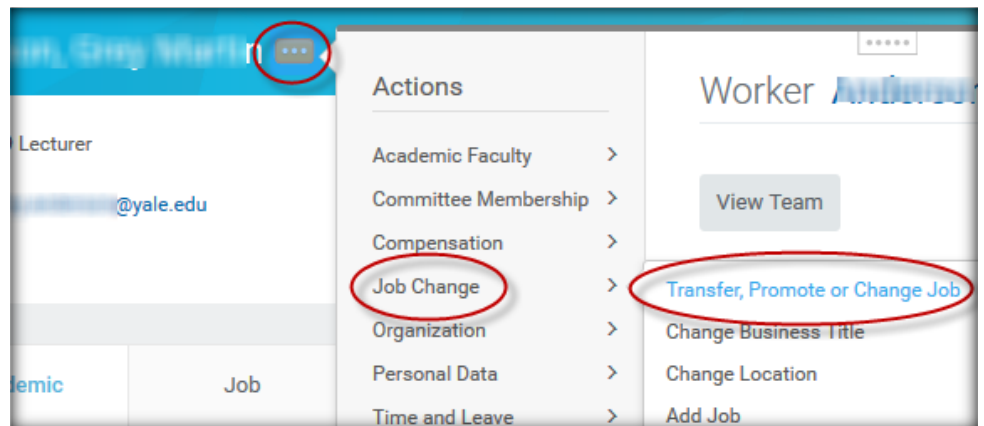
3. In the **Start** window, enter the information as displayed in the example to the right.

   Click **Submit**.

4. **What do you want to do with the opening left on your team?** Select **Close this headcount**.

   Click **Next.**

5. In the comment field in the final review window enter the following statement, "Transferring to teach in Summer Session per request from …" and enter the name of the Summer Session contact.

   Click **Submit**.

Start

Start Details

When do you want this change to take effect? *

06 / 01 / 2016 📅

Why are you making this change? *

✕ Transfer - Change Manager ☰

Who will be the manager after this change?

✕ Fitzpatrick, Michael ☰

Which team will this person be on after this change?

✕ Yale College - Summer Session (Fitzpatrick, Michael) ☰

Where will this person be located after this change? *

✕ Whitney Ave, 55 ☰

⟩ Details