Office of Faculty Administrative Services (OFAS)

Information Session for Faculty of Arts and Sciences (FAS) Faculty Appointments Administrators

January 26, 2018
Agenda

Annual Faculty Activity Report Process

Demo of new Course and Committee Reporting Tool

Update on Faculty Leave Requests for Academic Year 2018-19

Clarification of Administrative Processes specific to the Faculty of Arts and Sciences (FAS)
Annual Faculty Activity Report Process
Annually...

To be considered for a merit increase, all ladder faculty and multi-year instructional faculty are required to submit a Faculty Activity Report (FAR).

In past years, these reports as well as other documents were uploaded to SharePoint.
FARs 2017 submission process:

• In November, faculty received the first message from Dean Tamar Gendler with instructions.
  – Ladder memo
  – Instructional faculty memo

• Faculty were asked to complete a Faculty Activity Report form.
  – Different form for ladder and instructional due to differing activities

• Faculty uploaded forms along with copy of current CV to Workday.

• Questions and concerns: Faculty were directed to Nicole Gilmore (nicole.gilmore@yale.edu) in the FAS Dean’s Office.
Viewing FARs:

- Department chairs and deans can view reports and CVs as soon as they are uploaded to Workday.
- Instructions for viewing are online at:
  - Guide: [https://workday.training.yale.edu/system/files/academic-faculty-activity-report.pdf](https://workday.training.yale.edu/system/files/academic-faculty-activity-report.pdf)
  - View video: [http://workday.preview.yale.edu/WBT-Faculty-Activity-Report/](http://workday.preview.yale.edu/WBT-Faculty-Activity-Report/)
Other supporting documents for annual review:

- To be sent via email from Mary Magri, FAS Lead Administrator:
  - Course/teaching history for the past 5 years
  - Committee memberships for the past 5 years – Only memberships on President, Provostial, and Yale College committees
  - Sponsored research (grants/awards) activity in 2017

- Appointment history:
  - Workday report, Academic - View Appointment History - Yale

- Leave history:
  - Previously provided in chair packets
  - Workday report, Academic - Ladder Faculty Leaves By Term - Yale
Questions or problems with access:

Nicole Gilmore (nicole.gilmore@yale.edu) in the FAS Dean’s Office

or

Alexa Schlieker (alexa.schlieker@yale.edu)
New Course and Committee Database
Fall 2013 - Faculty Information System (FIS) became available
• Oracle-based report tool
• Provided access to history of *faculty appointments*, *leaves*, *teaching*, and certain *committee memberships*

7/1/15 – Workday became the official source for history of *faculty appointments* and *leaves*.

7/1/17 – Roll out of Workday financials
• Oracle will be sunset
• Need access to history of *teaching*, and certain *committee memberships*
January 2018:

New online report using Tableau to access Course Information and Committee Memberships
• Available at https://bi.analytics.yale.edu/#/site/OFAS/projects/482/views

Information sources:
• Courses – Banner, official course registration system
• Committees – Yale system used by the Provost’s, Yale College, and President’s Offices
All faculty appointments administrators will have access to this reporting tool.

Discrepancies in the report information:
• **Courses** – Your department registrar
• **Committees** – Either the Provost’s, Yale College, and President’s Offices, depending on the committee

Questions or problems with functionality:
• faculty.admin@yale.edu
Update on Faculty Leave Requests
Basic procedure for academic leaves:

1. Faculty member submits request to chair.
2. Chair forwards to Office of Faculty Administrative Services (OFAS).
3. OFAS verifies eligibility. Sends requests and eligibility review to FAS Dean’s Office.
4. FAS Dean’s Office sends approvals to faculty directly with copy to department admins.
FAS leave approval processing

✓ Leaves requests are currently being reviewed for eligibility

✓ Early February: FAS Deans will send approvals via email to
  ✓ Faculty member
  ✓ Cc: chair, chair assistant, and operations manager

✓ Upon receipt of approval, chair’s assistant enters leave in Workday
  ✓ Reference Workday Training Guide: *Leave of Absence: Absence/Relief Time – Academic (Time Off)*
    Note: Workday process is a 2 step process for the initiator and 2 steps for Business Partner approval

✓ Faculty Affairs staff approves leave in Workday

✓ Cost Center Costing Allocation Specialist updates costing if needed
Questions or to report changes to leaves, including cancellations:

faculty.admin@yale.edu
Clarification of Administrative Processes
In July 1, 2014, the (FAS) Dean’s Office was created, and chairs began reporting to the FAS deans.
All FAS departments and programs report to the FAS Dean’s Office and must adhere to the policies and procedures established by that office.

Faculty Administrative Services supports the systems used in the faculty appointment process, and provides assistance with policy interpretation as stated in the Faculty Handbook for all schools.

<table>
<thead>
<tr>
<th>Examples of Roles and Responsibilities</th>
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<tbody>
<tr>
<td><strong>FAS Dean’s Office</strong></td>
<td><strong>Faculty Admin Services</strong></td>
</tr>
<tr>
<td>Approves searches, ads, and establishes procedures</td>
<td>Supports Interfolio Faculty Search module</td>
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<tr>
<td>Establishes policies and procedures for tenure reviews</td>
<td>Supports Interfolio Promotion and Review module</td>
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<tr>
<td>Creates official offer letters for appointees</td>
<td>Supports Workday and approves transactions</td>
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<td>Establishes required documents for faculty files</td>
<td>Gathers required documents and creates faculty files</td>
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Supporting Documentation

- Refer to FAS Chart of Required Documents

- Fully executed letter from a Dean
  1. Description of Work, including
     a) Appointment rank
     b) Academic unit
  2. Dates – Start and End
  3. Compensation amount, if any

- If Compensation, Faculty Compensation Approval Form
  • Amount must match the amount in accompanying letter
  • Dates must match those in the letter
Questions regarding policies and procedures:

fas.dean@yale.edu

Questions regarding system support or access:

faculty.admin@yale.edu