

# Instructions for Paying Summer Compensation in Workday

All teaching faculty who work in the summer or for a summer program must be paid with summer compensation. Summer compensation is paid using Manage Period Activity Pay Assignments in Workday. This functionality has been configured to only pay on the job types of Summer Compensation and Teacher Summer Programs. This document contains instructions for adding these two job types as well as instructions for entering summer compensation payments.

Prior to entering the transaction in Workday, complete the appropriate Summer Compensation Form:

- In June 2017 use <https://your.yale.edu/policies-procedures/forms/3501-fr08-app-e-faculty-summer-compensation-form-june-2017>.
- In July 2017 and August 2017 use <https://your.yale.edu/policies-procedures/forms/3501-fr08-faculty-summer-compensation-form-july-and-august-2017>.

## Adding a job

### Deciding which type of job to add:

- Summer Compensation job
  - Full-time, full year faculty, i.e. appointments span from July 1-June 30
- Teacher Summer Programs job
  - Active faculty who are between appointments, i.e. no appointment in June, July, or August
  - Active faculty with current appointments but no compensation, e.g. Emeritus faculty

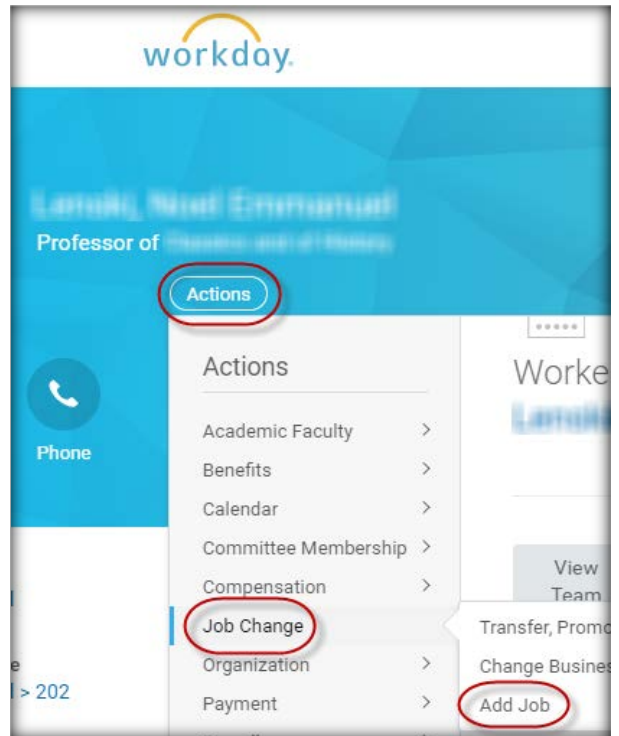
### Instructions for adding the job:

1. Search for the faculty member in Workday and open the record. If there is an arrow to the right of the business title, click on the arrow to verify that it is for the Summer Compensation job.
  - a. **If so, you will not need to add a Summer Compensation job and may skip to page 3, “Instructions for adding summer compensation in Workday.”**
  - b. If you do not see an arrow, you will need to add one following the instructions below.



2. Below the faculty member's business title, click on the 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 or school dean. It will have the naming convention of "**Summer Compensation –**", followed by the name of your department, then followed by the name of your chair or dean in parenthesis.
  - a. If a summer compensation organization does not exist, 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**.



Note: The process for adding a Summer Compensation job and a Teacher Summer Programs job is very similar. Below are instructions for adding a Summer Compensation job followed by a screenshot for adding a Teacher Summer Programs job

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 future 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 your department name**) and **paste** it into the **Job Title** field.

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


You will immediately see a To Do to enter the compensation using Manage Period Activity Pay Assignments. If you choose not to enter the compensation at this time, the To Do will remain in your Workday Inbox as a reminder. Click Submit on the To Do once you have submitted the payment.

For the Teacher Summer Programs job enter the following:

- Employee Type = Other Academic
- Time Type = Part time
- Location = your office location
- Scheduled Weekly Hours = 19

Click Submit.

**NOTE: Send an email to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) asking to have the pay group assigned for this Teacher Summer Programs position. Otherwise, you will not be able to enter the payment.**

Effective Date \* 05 / 19 / 2017 

Reason \*

### Job Details

Employee Type \*

Job Profile \*


Time Type \*

Location \*

Work Space

Pay Rate Type

Scheduled Weekly Hours

 Additional Details

Job Title

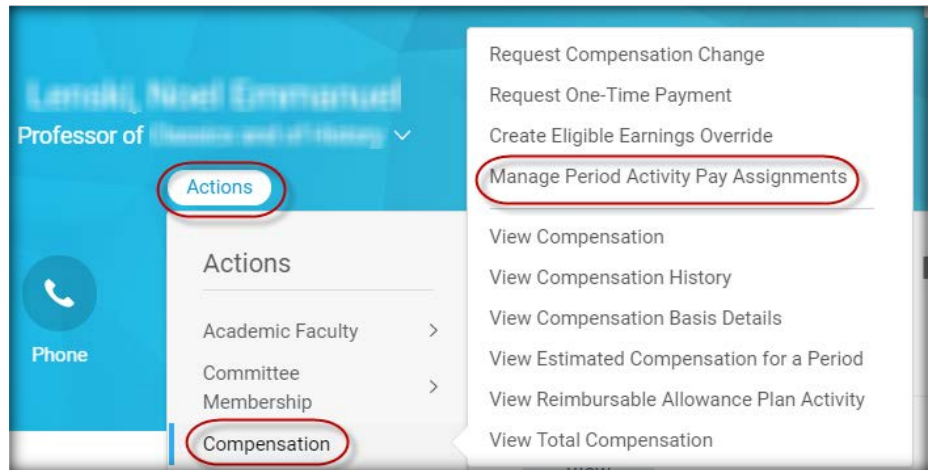
Business Title

Location Weekly Hours 40

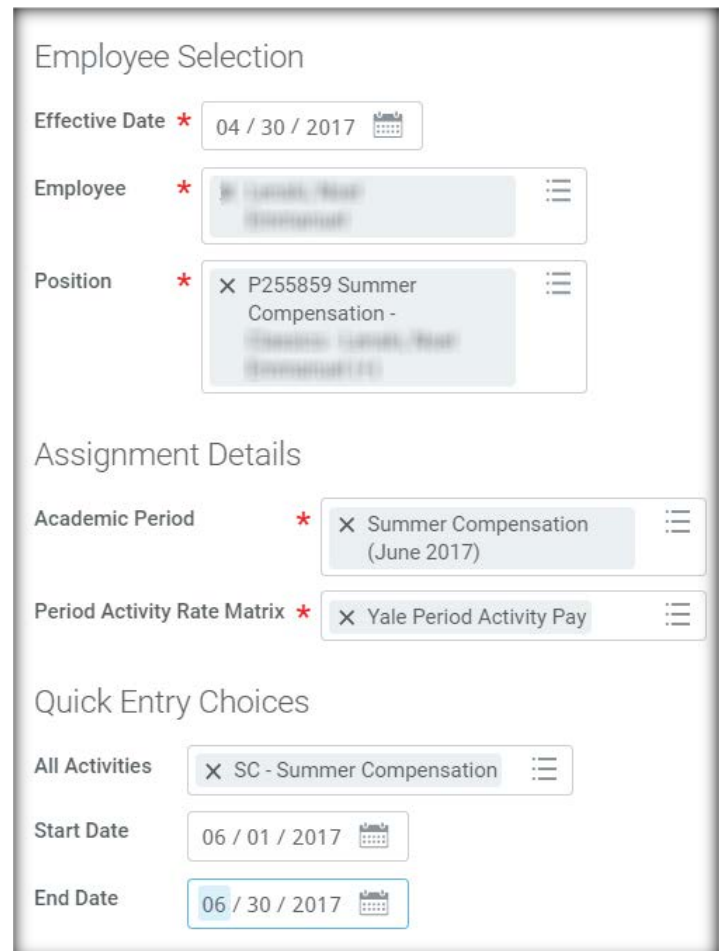
Default Weekly Hours

## Entering 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 either the appropriate **summer position**.
4. **Academic Period:** Select the period for the payment that you are about to enter.
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**.

A screenshot of the 'Employee Selection' page in Workday. The page is divided into several sections: 'Employee Selection', 'Assignment Details', and 'Quick Entry Choices'. In the 'Employee Selection' section, the 'Effective Date' is set to 04/30/2017. The 'Employee' field shows 'Lemski, Noel Emmanuel'. The 'Position' field shows 'P255859 Summer Compensation - [Department]'. In the 'Assignment Details' section, the 'Academic Period' is set to 'Summer Compensation (June 2017)' and the 'Period Activity Rate Matrix' is set to 'Yale Period Activity Pay'. In the 'Quick Entry Choices' section, the 'All Activities' field is set to 'SC - Summer Compensation'. The 'Start Date' is 06/01/2017 and the 'End Date' is 06/30/2017.

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.**

Position P255859 Summer Compensation -

Academic Period \* Summer Compensation (June 2017)

Rate Matrix Yale Period Activity Pay

Reason \* X Period Activity > New Assignment > Summer Compensation Assignment

\*Activity

Activity \* X SC - Summer Compensation

Task

Comment

Expand

\*Compensation

Total Amount \* 1.00 Start Date

Currency USD End Date

1 Do Not Pay

## Procedures for instructors who teach in Summer Session

Only the faculty whom you are planning to terminate in your department may need to be transferred to Summer Session. You will need to initiate the transfer by doing a Job Change. Instructions are on the OFAS website, [Procedure for transferring faculty to Summer Session](#).