

**Office of Faculty Administrative
Services (OFAS)**

Information Session

October 12, 2018

Reminders and Updates

OFAS Goals FY19

- **Perfect Documentation Plan**
-

Updates to Workday

- External Links
 - Course and Committee Information
 - Changes to Report: *Academic - Compensation Details – Yale*
-

Policy Review: Compensating faculty

Reminders and Updates

Deadlines: October–May

- FAS – **9th** of every month
- Professional schools – **15th** of every month
- To allow time to
 - ✓ Check supporting documents
 - ✓ Obtain approvals from the Offices of the FAS Dean and the Provost
 - ✓ Check entry in Workday



Transactions in **Workday** that are **more than 1 month old** and missing supporting documents may be sent back.

Copies of presentations

These presentations will be sent via email following the session.

They will also be posted on the [OFAS website](#):

- Administrative Processes menu > Resources

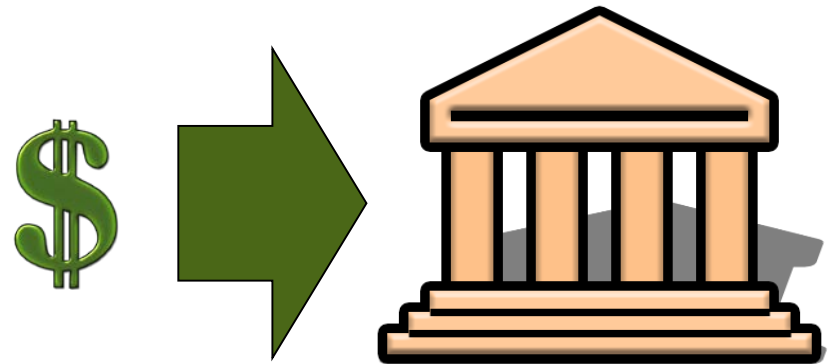
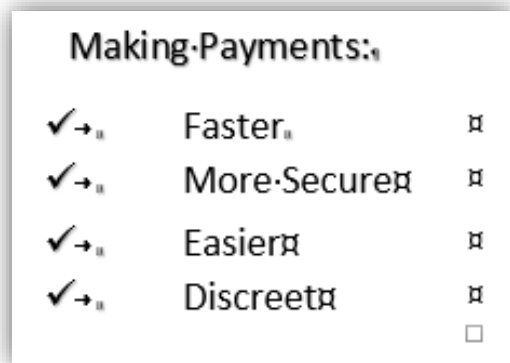
The screenshot shows the 'Faculty Administrative Services' website. The main navigation bar includes 'HOME', 'SEARCHES & APPOINTMENTS', 'ACADEMIC CAREER EVENTS', 'ADMINISTRATIVE PROCESSES', 'CALENDAR', and 'CONTACT US'. The 'ADMINISTRATIVE PROCESSES' menu is expanded, showing sub-items: 'Administrative Processes', 'Checklists, Forms, and Templates', 'Managing Compensation', 'Related Systems', and 'Resources'. A red arrow points to the 'Resources' item, which has opened a sub-menu containing 'Monthly Information Session Presentations' and 'Related websites and contacts'. The main content area displays the breadcrumb 'HOME > ADMINISTRATIVE PROCESSES > RESOURCES > MONTHLY INFORMATION' and the title 'Monthly Information Session Presentations'. Below the title are buttons for 'View', 'Edit', and 'Manage display'. At the bottom, it says 'Academic year 2017-18'.

Direct Deposit






Individuals on monthly payroll who receive paper checks received a note from the Payroll Office in their September paycheck encouraging Direct Deposit.

If you are responsible for handing out checks, please politely suggest the option of direct deposit.

Instructions in Workday guide, "Manage Payroll Options and Tax Forms (for Employees)", page 2.



OFAS Goals FY19

	Reduce average time to close cases received through faculty.admin@yale.edu .
	Reduce average time to complete Workday transactions.
	Reduce the number of cases requesting instructions on procedures.
	Improve user experience of faculty affairs administrative staff throughout Yale. 

The plan to achieve OFAS goals:

Perfect Documentation

- ✓ Perfect Documentation provided by Yale academic leadership.
- ✓ Perfect Documentation provided by OFAS.
- ✓ Perfect Documentation from submitters of transactions.



Leaders

- Clearly stated policies and procedures.
- Consistent standards and practices
 - e.g. formal letters or memos for all transactions

OFAS

- Updated and easily navigable website.
- Updated guides for Interfolio and Workday.

Staff

- Submission of complete packet of required materials.
- Timely submission, i.e. prior to entry of transaction in Workday.

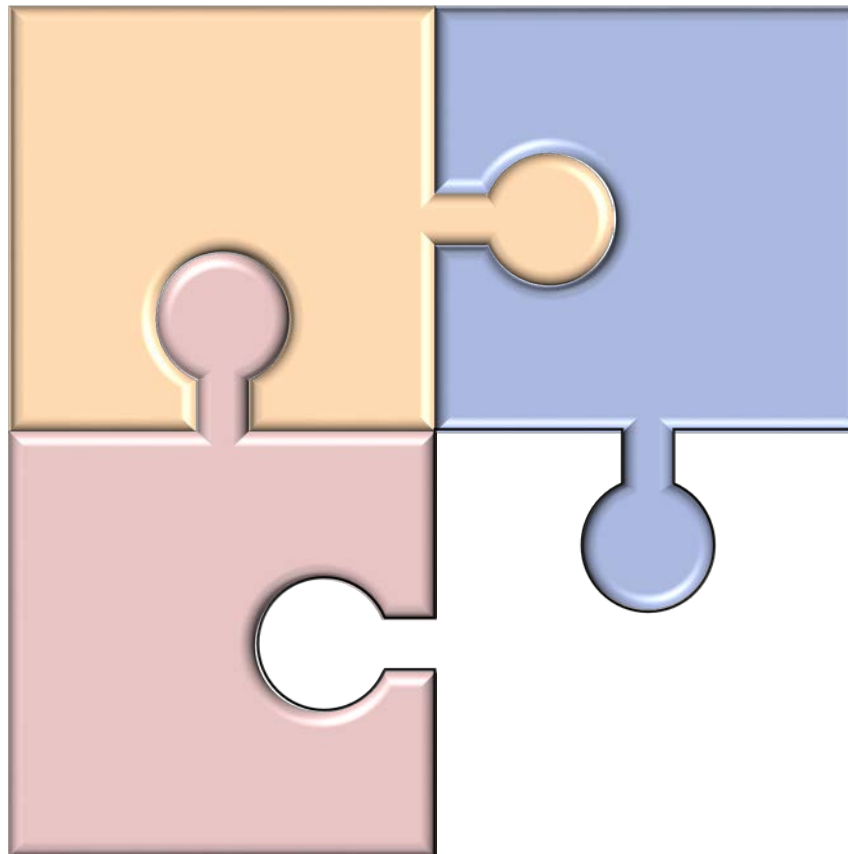
OFAS Administrative Procedures Model

For additional information, refer to the [Administrative Processes](#) page on the OFAS website.

External Processes –

Obtaining approval, Search, Promotion Review, Hire, Send offer letter, etc.

Submit all documentation to faculty.admin@yale.edu and receive ticket number for tracking.



Documentation –
Charging Instructions (if compensation), Signed Offer Letter, recommendation letters, CV, etc.

Submit transaction in **Workday**.
Note: Include SF ticket # in comments.

Here's how you can help:

1. Focus on Perfect Documentation.
2. Be aware of activities in your department that may require faculty transactions.
 - Discuss with your academic dean or department chair.
 - Ask questions early if you think an activity has the potential of requiring a transaction.
3. Become familiar with the documents that will be required by going to the [OFAS Administrative Processes](#) page.
4. Begin gathering the Perfect Documentation.
5. When the activity has completed, submit the documents to faculty.admin@yale.edu following the instructions on the [OFAS Administrative Processes](#) page.
6. Include the case number in the comments field of the transaction in Workday.



Here's how WE can help YOU:

If you are unsure of the procedure for entry into Workday, do not enter the transaction in Workday.

Instead, add a comment to your email submission of the documentation asking for assistance with the transaction. We will reach out to you.

Your focus should be on gathering the necessary and complete documentation.

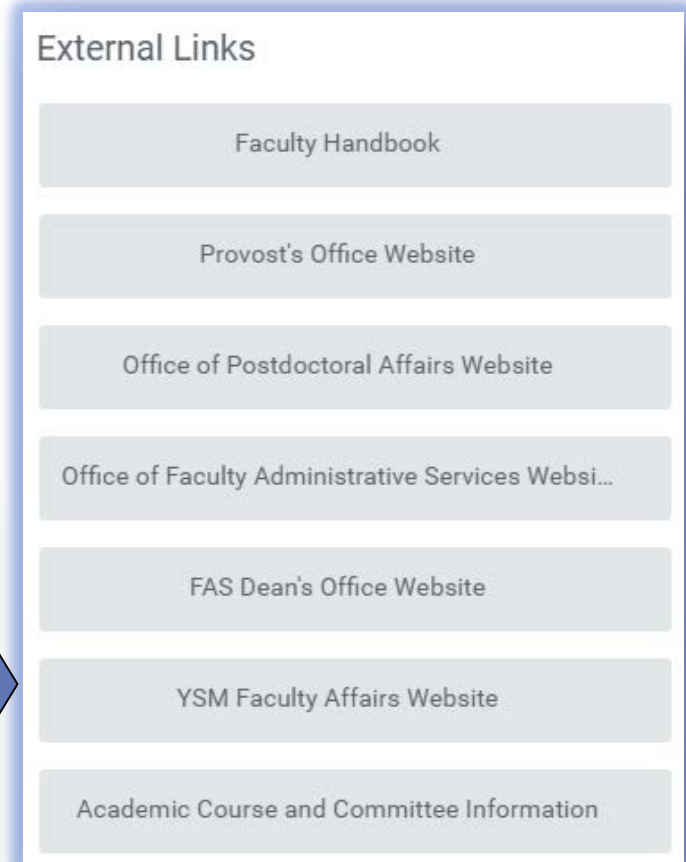
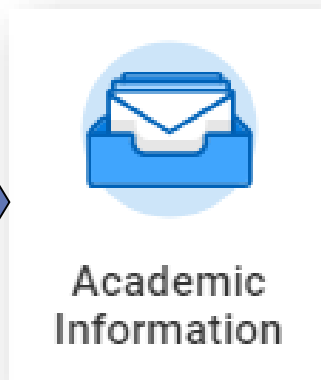
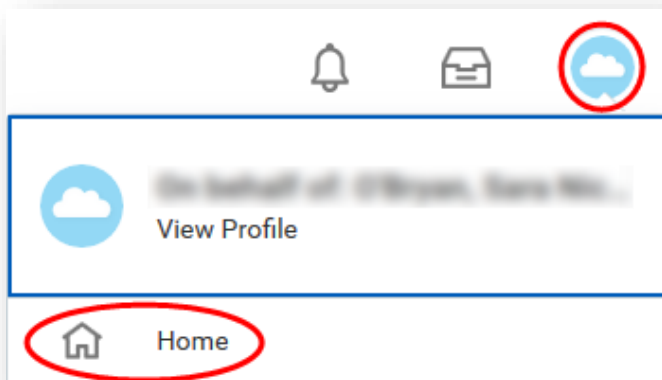


Updates to Workday

Workday

Update to *External Links* within *Academic Information*

- Go to your Workday Home page
- Click the worklet Academic Information



External Link: *Academic Course and Committee**

- Course information - Pulled from Banner, the official course registration system
- Committee information - Pulled from database maintained by Provost's Office and Yale College Dean's Office

External Links

Faculty Handbook

Provost's Office Website

Office of Postdoctoral Affairs Website

Office of Faculty Administrative Services Websi...

FAS Dean's Office Website

YSM Faculty Affairs Website

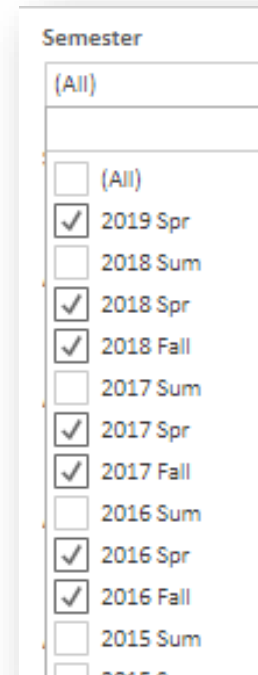
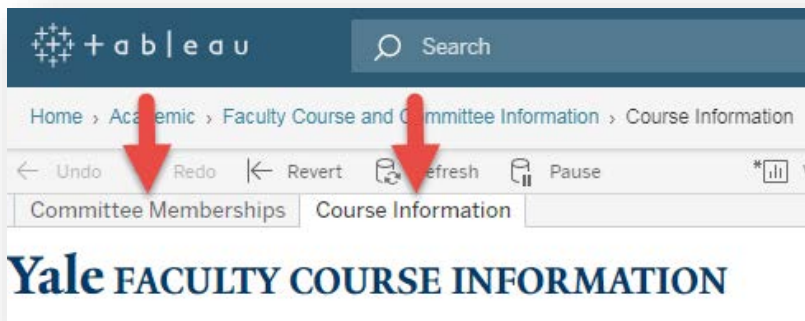
Academic Course and Committee Information

* This is separate from the FAS course evaluation site, aka OCE Faculty Dashboard.

External Link: *Academic Course and Committee link*

Tips regarding filters

- The view defaults to the Committee tab. Toggle between Committee and Course information by clicking the desired tab.
- The Semester options are in reverse alpha order, not reverse chronological order. Thus, exercise care when selecting desired terms or academic years.



External Link: *Academic Course and Committee link*

- Access automatically given to the following Workday roles:
 - Appointment & Promotions Specialist
 - Appointment & Promotions Specialist
 - HCM View-Only Academic
 - Provost Office (Academic)
 - Section Appointment & Promotions Specialist
 - Faculty Affairs Coordinator (Academic)



Change to Workday report:

Academic - Compensation Details – Yale

Recommendation:

- Run this report bi-annually, after the start of the term, to check term faculty.
- Filter on Disbursement Plan Periods that are less than the full year.
- Filter out Total Academic Salary $< > 0$ (zero).
- For those faculty who do not have an end date, consider entering an end date that aligns with the end of the appointment to avoid potential overpayments. (Reference Workday guide, "*Manage Compensation (Academic)*")

Academic - Compensation Details – Yale (sample view)

29 of 108 items

Disbursement Plan Period	Has Grandfathered Base?	YSM Base	YSM Supp	Total Academic Salary	Total Academic Salary (incl FTE)	Salary Plan Actual End Date
5 Month DP - January (January 1 - May 31)		0	0	0	0.00	✓
6 Month DP - January (January 1 - June 30)		0	0	0	0.00	✓
5 Month DP - August (August 1 - December 31)		0	0	54,054.05	18,000.00	
5 Month DP - August (August 1 - December 31)		0	0	27,027.03	9,000.00	12/31/2018 ✓
10 Month DP - Aug (August 1 - May 31)		0	0	73,873.87	24,600.00	

Policy Review: Compensating faculty

Policies in [Faculty Handbook](#)

Section XVIII. Faculty Compensation, Benefits and Services

All faculty and staff who process compensation for academics should be familiar with this section of the Faculty Handbook.

Yale Faculty Handbook



Yale Policies & Procedures

1001 Compensation Above Salary

[1001.1 Faculty](#)

Faculty employed full-time by the University normally may not receive additional income from the University for work performed during a period of full-time employment.

Requests for exceptions to this policy are rarely given and must be made in advance and in writing to the Provost or Provost Designee.

Yale Policies & Procedures

3501 Payroll – highlights

[3501.2 Off-Cycle Payments](#) (aka “Quick Pay” or “On Demand”)

All requests for payments must be approved by the Controller’s Office.

Payroll payments are limited to regularly scheduled pay dates.

Exceptions:

- If there is no “next payment” due to termination.
- Errors in payroll processing that result in an underpayment of a monthly employee’s base salary.

Yale Policies & Procedures

3501 Payroll – highlights

[3501.3 Retroactive Pay](#)

Retroactive salary adjustments will be included in the employee's next regularly scheduled paycheck.

Yale Policies & Procedures

3501 Payroll – highlights

[3501.4 Overpayments](#)

The department must immediately inform Payroll by submitting the proper form to employee.services@yale.edu.

Payroll will calculate the amount of the overpayment and notify the lead administrator and employee that corrective action will be taken to reimburse the University for the funds.

In the case of an active employee, the overpayment will be deducted from the employee's next regularly scheduled paycheck(s).

Yale Policies & Procedures

3501 Payroll – highlights

[3501.12 Responsibilities of the Employee](#)

It is the responsibility of the employee to review all payments and deductions on their pay document for accuracy and notify the Employee Service Center (ESC) immediately if discrepancies are identified.

Academic leave process and timeline
