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
Reminder and Update

**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.
**Remainder**

**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
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
<table>
<thead>
<tr>
<th><strong>OFAS Goals FY19</strong></th>
<th>Reduce average time to close cases received through <a href="mailto:faculty.admin@yale.edu">faculty.admin@yale.edu</a>.</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Reduce average time to complete Workday transactions.</td>
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<td>Reduce the number of cases requesting instructions on procedures.</td>
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<td>Improve user experience of faculty affairs administrative staff throughout Yale.</td>
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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.
OFAS Goal FY19

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.
   - As 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
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

*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)
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)”
## Updates to Workday

### Academic - Compensation Details – Yale (sample view)

<table>
<thead>
<tr>
<th>Disbursement Plan Period</th>
<th>Has Grandfathered Base?</th>
<th>YSM Base</th>
<th>YSM Supp</th>
<th>Total Academic Salary</th>
<th>Total Academic Salary (incl FTE)</th>
<th>Salary Plan Actual End Date</th>
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<tbody>
<tr>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td>✓</td>
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<td>0</td>
<td>0</td>
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<td>✓</td>
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<tr>
<td>5 Month DP - August (August 1 - December 31)</td>
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<td>18,000.00</td>
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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.
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.
Policy Review: Compensating faculty

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.
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<td><strong>Yale Policies &amp; Procedures</strong></td>
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<td><strong>3501 Payroll – highlights</strong></td>
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<td><strong>3501.3 Retroactive Pay</strong></td>
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Retroactive salary adjustments will be included in the employee’s next regularly scheduled paycheck.
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 deducted from the employee’s next regularly scheduled paycheck(s).
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