Office of Faculty Administrative Services (OFAS)

Monthly Information Session

October 14, 2016
• Housekeeping

• Review administrative procedures

• Workday Updates

• Workday Tips

• Interfolio
Deadlines to submit transactions for processing, includes supporting documents and entry into Workday, to allow time to obtain approvals from the Offices of the FAS Dean and the Provost

- **FAS** – 9th of every month
- **Professional schools** – 15th of every month
- Processing priority is given to items due in the current month or earlier

- Transactions in Workday that are more than 1 month old and missing supporting documents will be sent back.
Info session presentations from 2015-16 are available online at http://facultyadmin.yale.edu/monthly-information-session-presentations.

Sessions from prior years are still on ClassesV2, https://classesv2.yale.edu/portal.

OFAS Training sessions

- **Workday**
  - Monthly starting in November
  - Compensation and job changes
  - Register on TMS

- **Interfolio** – on demand
• Instructions for processing transactions
• Charging Instructions for Faculty Compensation
• Secondary Appointments
Instructions for processing transactions are online at [http://facultyadmin.yale.edu/admin-processes](http://facultyadmin.yale.edu/admin-processes)

• Gather all of the necessary documents as stated in the Chart of Required Documents and submit to OFAS upon submission to Workday.

• DO NOT SUBMIT in Workday unless you have all of the documents.

• All transactions involving compensation must be accompanied by the Charging Instructions form regardless of who is scheduling the labor.

• These documents are sent to the either the FAS Deans or the Provosts or both for approval. Therefore they must be complete to assist them in the approval process.
Review administrative procedures

External Processes – Search, Promotion Review, Hiring, etc.

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

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

Submit transaction in Workday.
Charging Instructions for Faculty Compensation

• For annual salary, this is not the monthly amount. This is the total to be paid to the individual.

• Rule of Thumb: It should match the amount on the offer/reappointment letter.

• For secondary appointments, only enter the amount and the FTE % time that is being granted by the secondary department.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reappointment with Compensation - FTE % Required</td>
<td></td>
</tr>
<tr>
<td>FTE % time (=scheduled hrs/40): 33.30</td>
<td></td>
</tr>
<tr>
<td>Effective start date for this compensation:</td>
<td>1 Sep 2016</td>
</tr>
<tr>
<td>End (stop) date:</td>
<td>31 Dec 2016</td>
</tr>
<tr>
<td>Compensation amount (total of this transaction only):</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Additional information:</td>
<td>Teaching one ethics course in Fall 2016</td>
</tr>
</tbody>
</table>
Secondary appointments

• Use new Secondary Appointment Form
  • It will need to be routed to respective deans or department chairs for approval
  • Secondary appointments with compensation must be sent to supervisory org for entry into Workday.
    • If you have questions about the status of the transactions, contact the supervisory org directly.
Terminating faculty

• Need resignation letter if leaving before original end date.

• In Workday:
  • Begin by using the Terminate Employee business process. Once approved, you will receive a To Do to end the academic appointment(s).
  • The Termination Date = Last Day of Work
  • If you receive an error, contact OFAS. There may be a process that is blocking.
  • Always close the position.

• Terminate email account by sending email to Client Accounts
Academic enhancements

• Profile page for Academic Appointees has been enhanced to make it easier to access frequently used information. These enhancements are delivered as new tabs:
  – At a Glance Tab
  – Period Work Status Tab
  – Time Off Tab
**At a Glance**  *Presents a summarized view of both academic and employee job information into one concise page*

<table>
<thead>
<tr>
<th>Academic</th>
<th>Job</th>
<th>Compensation</th>
<th>Benefits</th>
<th>Pay</th>
<th>Time Off</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>At A Glance</strong></td>
<td>Current Appointments</td>
<td>Appointment History</td>
<td>Period Work Status</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**General Information**
- **Work Status**: On Academic Leave, Relief Time, or Other Leave
- **Tenure Status**: Term
- **Appointment Status**: Current
- **Employee ID**: 113148
- **Position**: Associate Professor Term
- **Hire Date**: 01/01/2010
- **Date of First Appointment**: 01/01/2010
- **Pay Rate Type**: Salary
- **Supervisory Organization**: [Link to Supervisory Organization]

**Education**
- University of California-Los Angeles, Doctor of Philosophy, 2008
- University of California-Los Angeles, Master of Arts, 2003

**Current Appointments**
- **Title**: Associate Professor Term
- **Identifier**: P - Primary
- **Academic Unit**: [Link to Academic Unit]
- **Academic Rank**: Associate Professor on Term
- **Track Type**: Ladder
- **Term**: January 2010 - Present (6 years 9 months)
- **Title**: Associate Professor Term
- **Identifier**: S - Secondary
- **Academic Unit**: [Link to Academic Unit]
- **Academic Rank**: Associate Professor on Term
- **Track Type**: Ladder to Tenure
- **Term**: January 2016 - Present (9 months)
**Period Work Status**

Delivers a multi-period view into an appointee’s past, present and future appointment and leave statuses making it easier to determine leave eligibility.

<table>
<thead>
<tr>
<th>Period</th>
<th>Work Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring 2018</td>
<td>Active</td>
</tr>
<tr>
<td>Fall 2017</td>
<td>Active</td>
</tr>
<tr>
<td>Spring 2017</td>
<td>On Academic Leave, Relief Time, or Other Leave</td>
</tr>
<tr>
<td>Fall 2016</td>
<td>On Academic Leave, Relief Time, or Other Leave</td>
</tr>
<tr>
<td>Spring 2016</td>
<td>Active</td>
</tr>
<tr>
<td>Fall 2015</td>
<td>On Academic Leave, Relief Time, or Other Leave</td>
</tr>
<tr>
<td>Spring 2015</td>
<td>Active</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>Active</td>
</tr>
<tr>
<td>Spring 2014</td>
<td>On Academic Leave, Relief Time, or Other Leave</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>On Academic Leave, Relief Time, or Other Leave</td>
</tr>
<tr>
<td>Spring 2013</td>
<td>Active</td>
</tr>
</tbody>
</table>
**Time Off**

*In addition to the leave history, it also includes relief time such as Teaching Relief for Childrearing, Short Term Medical Disability, Phased Retirement, and Secondment.*

<table>
<thead>
<tr>
<th>Leave of Absence / Relief Time Type</th>
<th>First Day of Leave / Relief Time</th>
<th>Actual Last Day of Leave / Relief Time</th>
<th>Estimated Last Day Relief Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic &gt; Associate Professor Leave</td>
<td>07/01/2016</td>
<td></td>
<td>06/30/2017</td>
</tr>
<tr>
<td>Academic Status &gt; Teaching Relief Child Rearing</td>
<td>07/01/2015</td>
<td>12/31/2015</td>
<td>12/31/2015</td>
</tr>
<tr>
<td>Academic &gt; Junior Faculty Fellowship</td>
<td>01/01/2014</td>
<td>06/30/2014</td>
<td>06/30/2014</td>
</tr>
<tr>
<td>Academic &gt; Junior Faculty Fellowship</td>
<td>07/01/2013</td>
<td>12/31/2013</td>
<td>12/31/2013</td>
</tr>
<tr>
<td>Academic Status &gt; Teaching Relief Child Rearing</td>
<td>01/01/2011</td>
<td>06/30/2011</td>
<td>06/30/2011</td>
</tr>
</tbody>
</table>
Workday Tips

- Reporting
- Investigating transactions
- Important reason reason codes
Reporting

- Reports can be scheduled to run on a regular basis
- There are a number of recommended reports on the Workday @Yale Training site
- OFAS has a list of recommended reports and frequencies online at http://facultyadmin.yale.edu/recommended-workday-reports
- Run the report Academic – View Current Appointments and use this to update all of your internal faculty lists such as faculty lists in Interfolio and emailing lists
Investigating Transactions

- Transactions that you have processed in the last 30 days can be found in your Workday Inbox in the Archives.
Transaction Status

• Notifications are sent to you in Workday when transactions you initiated are completed, rescinded, or cancelled.
Worker History

• You can drill into any business process to review the status, the approval process, and the dates of all interactions with that event.
Reason Codes

It is important to select the correct reason code to control downstream processes.

• When changing the FTE % time, select one of the 4 options that begin with “Work Week Change…”
Workday Tips

Reason Codes

It is important to select the correct reason code to control downstream processes.

- For transactions related to Extra Compensation or Allowances, it is important to select the compensation plan that matches the desired element.
  - E.g. Taxable Reimbursement 120 vs. Taxable Reimbursement (without the 120)
• Update faculty lists in the Promotion and Tenure module
  – Need to remove faculty who should not have access
  – Add new faculty
  – Move faculty who have been promoted

• Administrative access should be restricted to administrative staff only
  – Deans and Department Chairs should not be given access
  – If they need access, provide this using group functionality
Open discussion

• Questions?

• Topics for future sessions

• Questions, feedback, or suggestions for future meeting topics are always welcome
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  – x6-1697