

# 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 – 9<sup>th</sup> of every month**
  - **Professional schools – 15<sup>th</sup> 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>

- 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 either the FAS Deans or the Provosts or both for approval. Therefore they must be complete to assist them in the approval process.

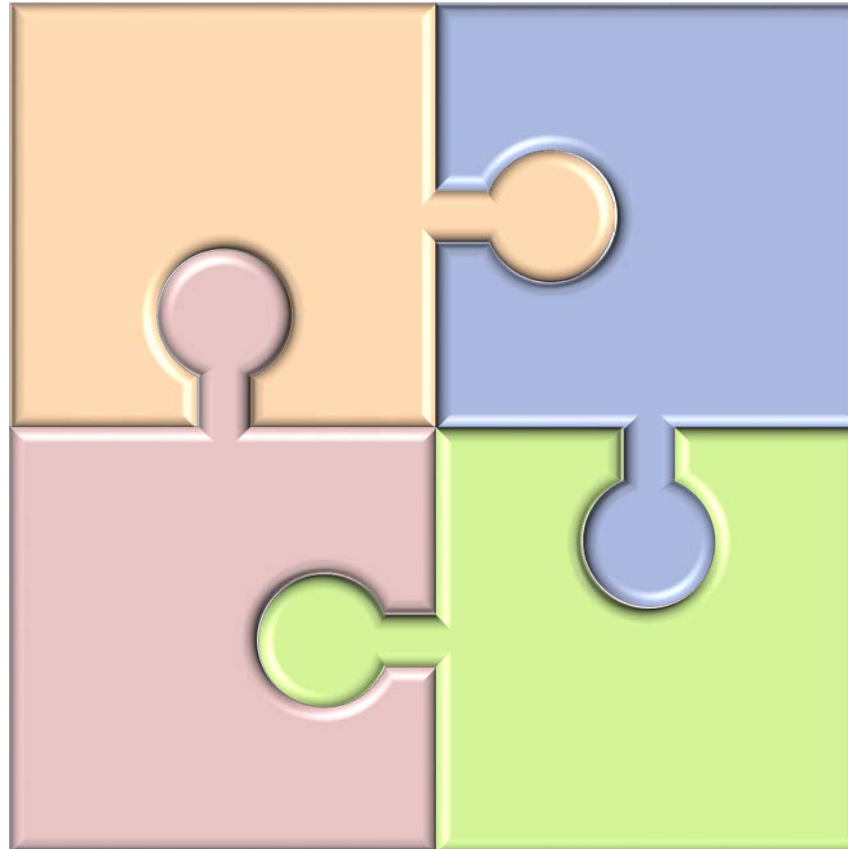
## External

### Processes –

Search, Promotion  
Review, Hiring, etc.

### Submit all

documentation to  
[faculty.admin@  
yale.edu](mailto: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 amount and the FTE % time that is being granted by the secondary department.

Signature	Date
<b>2. COMPENSATION INFORMATION (for this transaction only)</b>	
Reason: <u>Reappointment with Compensation - FTE % Required</u>	FTE % time (=scheduled hrs/40): <u>33.30</u>
Effective start date for this compensation: <u>1 Sep 2016</u>	End (stop) date: <u>31 Dec 2016</u>
Compensation amount (total of this transaction only): \$ <u>10,000.00</u>	
Additional information:	
<u>Teaching one ethics course in Fall 2016</u>	



## Secondary appointments

*New!*

- 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*

The screenshot shows the 'At a Glance' page for an academic employee. The page is divided into several sections: Academic, Job, Compensation, Benefits, Pay, and Time Off. The 'At a Glance' tab is selected. The page displays 'General Information' and 'Current Appointments'.

General Information	
Work Status	On Academic Leave, Relief Time, or Other Leave
Tenure Status	Term
Appointment Status	Current
Employee ID	113145
Position	Associate Professor Term
Hire Date	01/01/2010
Date of First Appointment	01/01/2010
Pay Rate Type	Salary
Supervisory Organization	Health Policy and Management

Current Appointments	
Title	Associate Professor Term
Identifier	P - Primary
Academic Unit	Health Policy and Management
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	Health Policy and Management
Academic Rank	Associate Professor on Term
Track Type	Ladder to Tenure
Term	January 2016 - Present (9 months)

[+ More \(1\)](#)

## 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.*

At A Glance | Current Appointments | Appointment History | **Period Work Status**

Hire Date 01/01/2010 Earliest Appointment Date 01/01/2010

16 items

Period	Work Status
Spring 2018	Active
Fall 2017	Active
Spring 2017	On Academic Leave, Relief Time, or Other Leave
Fall 2016	On Academic Leave, Relief Time, or Other Leave
Spring 2016	Active
Fall 2015	On Academic Leave, Relief Time, or Other Leave
Spring 2015	Active
Fall 2014	Active
Spring 2014	On Academic Leave, Relief Time, or Other Leave
Fall 2013	On Academic Leave, Relief Time, or Other Leave
Spring 2013	Active

Period Reporting Calendar [Academic Semesters](#)

Work Status Rule Set [Active and Leave Work Status Indicator](#)

## 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.*

The screenshot shows a navigation bar with tabs for Academic, Job, Compensation, Benefits, Pay, and Time Off. The Time Off tab is highlighted with a red circle. Below the navigation bar, there is a section titled "5 items" and a table titled "Leave of Absence / Relief Time Events".

Leave of Absence / Relief Time Events			
Leave of Absence / Relief Time Type	First Day of Leave / Relief Time	Actual Last Day of Leave / Relief Time	Estimated Last Day of Leave / Relief Time
Academic > Associate Professor Leave	07/01/2016		06/30/2017
Academic Status > Teaching Relief Child Rearing	07/01/2015	12/31/2015	12/31/2015
Academic > Junior Faculty Fellowship	01/01/2014	06/30/2014	06/30/2014
Academic > Junior Faculty Fellowship	07/01/2013	12/31/2013	12/31/2013
Academic Status > Teaching Relief Child Rearing	01/01/2011	06/30/2011	06/30/2011

- Reporting
- Investigating transactions
- Important reason reason codes

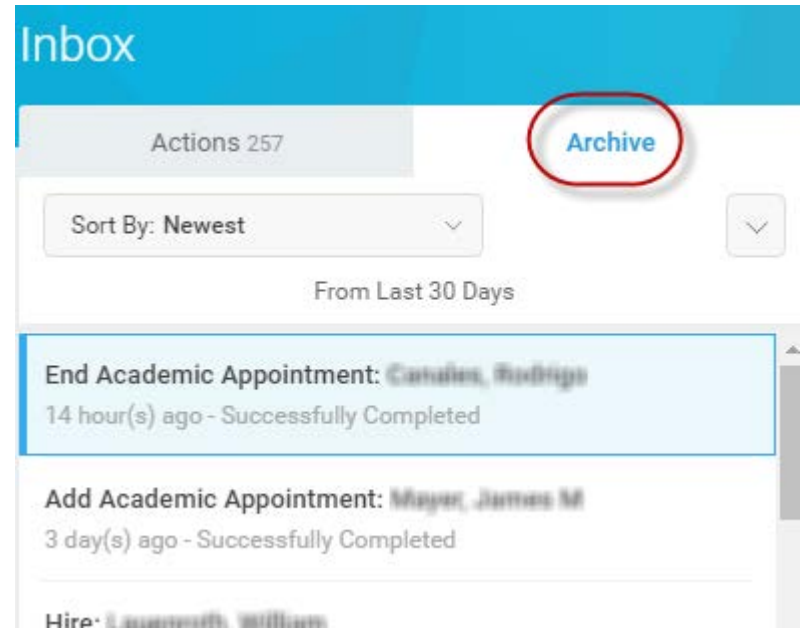
## Reporting

- 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



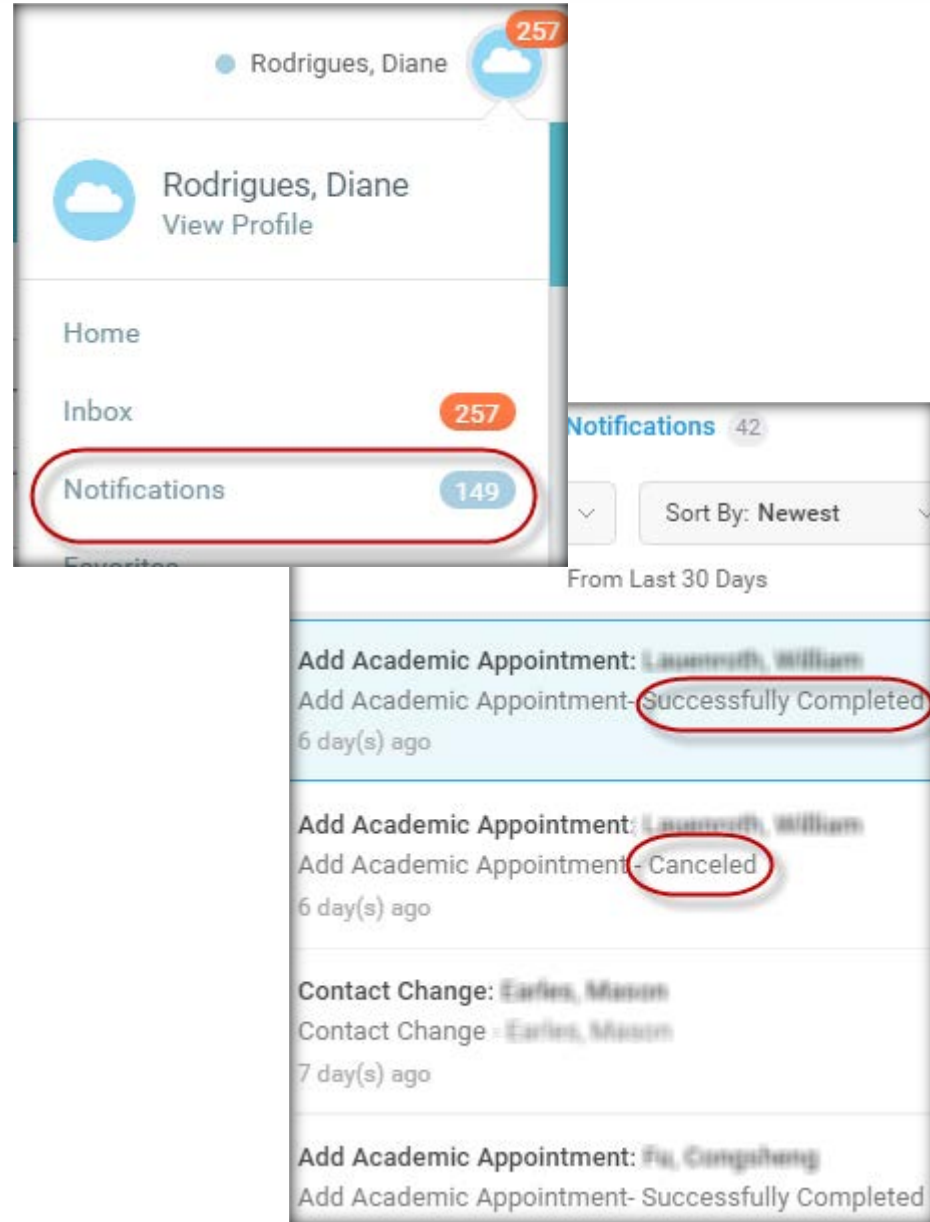
## Investigating Transactions

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



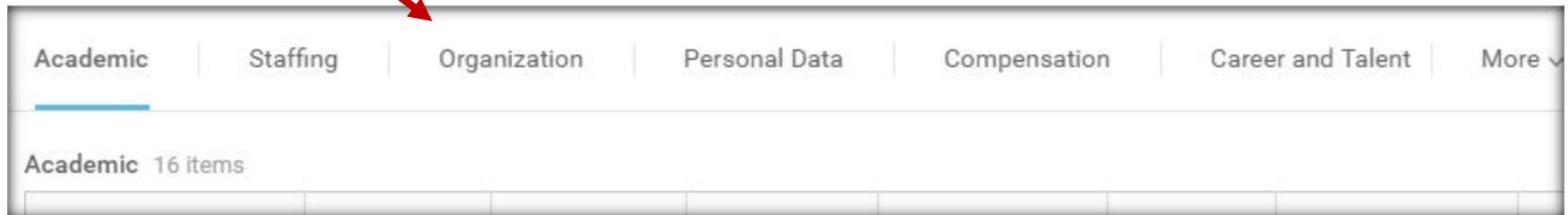
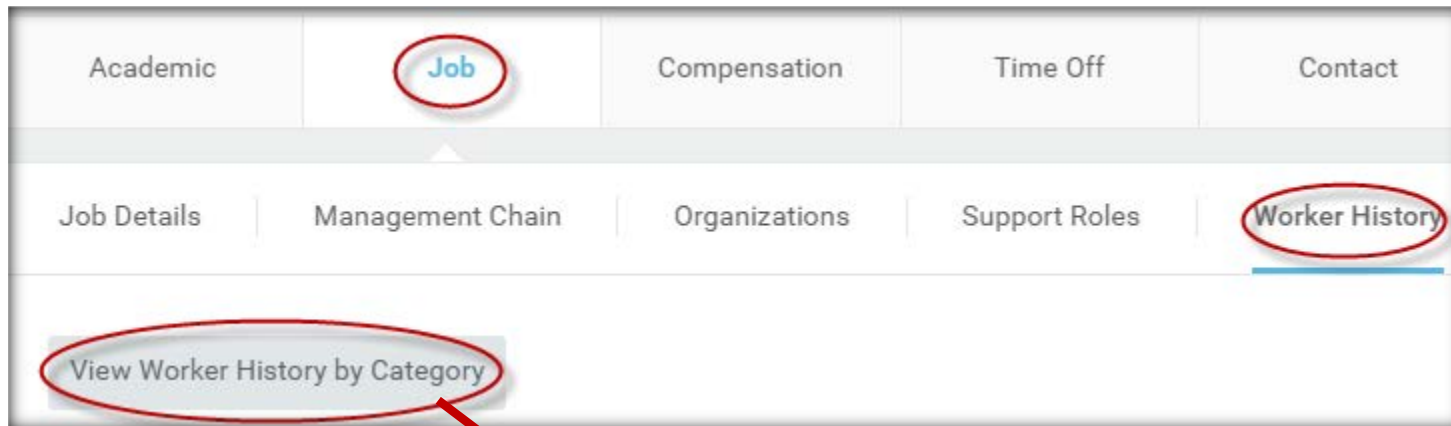
## Transaction Status

- 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.

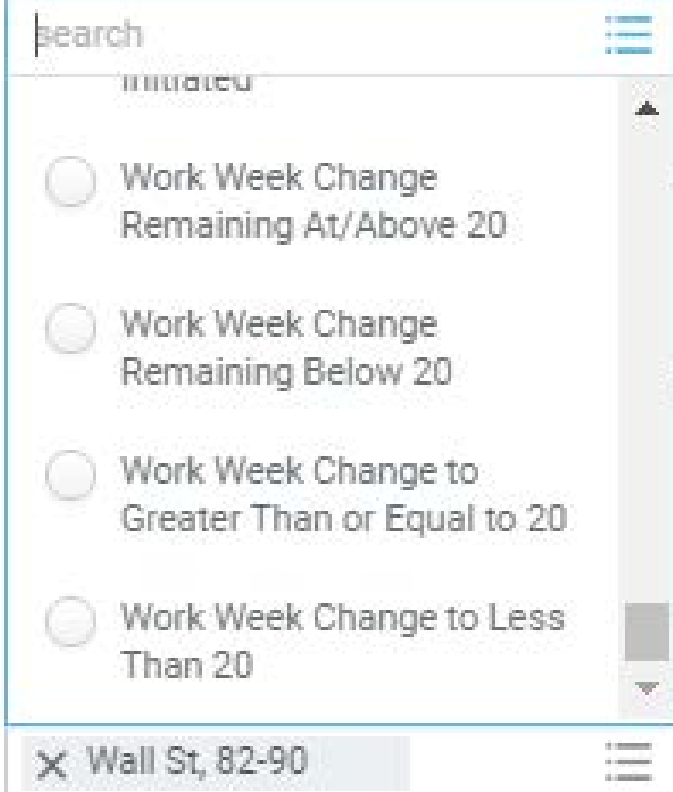


## Reason Codes

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...”**

Why are you making this change? \*



The screenshot shows a dropdown menu with a search bar at the top. Below the search bar, there are four radio button options:

- Work Week Change Remaining At/Above 20
- Work Week Change Remaining Below 20
- Work Week Change to Greater Than or Equal to 20
- Work Week Change to Less Than 20

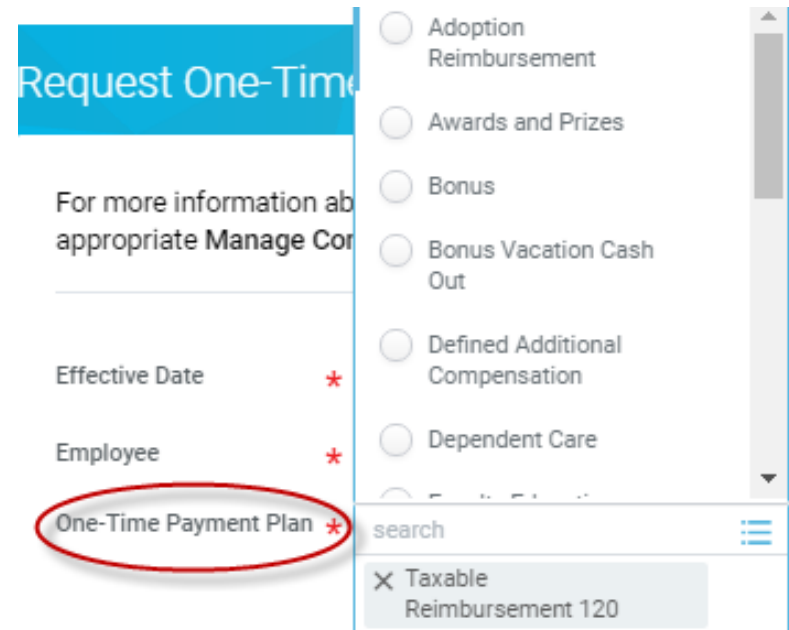
At the bottom of the dropdown, there is a button labeled "Wall St, 82-90" and a menu icon.

## 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 give access
  - If they need access, provide this using group functionality

- Questions?
- Topics for future sessions
- Questions, feedback, or suggestions for future meeting topics are always welcome
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