

# Office of Faculty Administrative Services (OFAS)

## Information Session

October 14, 2021

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## **Green Cards for Teaching Faculty**

- **Parker Emerson, Associate Director, Office of International Students and Scholars (OISS)**
  - **Mihwa Lee, Senior Advisor, Office of International Students and Scholars (OISS)**
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## **Updates and Reminders**

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## **Academic Leaves**

- **General Procedures**
  - **Changes, cancellations, and costing changes**
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October 14, 2021

# Green Cards for Teaching Faculty

Parker Emerson, Associate Director OISS

Mihwa Lee, Senior Adviser, OISS

# AGENDA

- ▶ What's new, what's not
- ▶ All OISS green card information is on [OISS web](#)
- ▶ Overview of entire green card process, and costs
- ▶ Focus on EB-2 Green Cards
- ▶ Communication with OISS
- ▶ Q&A

# What's New?

- ▶ OISS green card cases: now both Mihwa Lee and Parker Emerson
- ▶ Evolving Use of Outside Counsel
- ▶ More scrutiny of recruitment advertisements
- ▶ Department of Labor still slow and unforgiving

# What's Not New

- ▶ OISS does two types of green cards when the position is permanent/long-term:
- ▶ EB-1 Achievement based (for faculty or researchers - huge preparation involved)
- ▶ EB-2 Labor Certification (also known as PERM - based on recruitment/search)
  - ▶ Most common for newly recruited faculty
  - ▶ Positions with some “teaching” responsibilities
  - ▶ FYI:
    - ▶ Sr Lectors, Curators and Librarians may also qualify
    - ▶ All others do not qualify (occasional Exceptions Committee M&P case)
- ▶ When OISS is notified, process starts automatically for ladder-track faculty
- ▶ More on EB-2
  - ▶ Start to finish an EB-2 can take more than 2 years
  - ▶ **Very specific deadline: 18 months from date of ORIGINAL OFFER (not a revision) issuance**

## H and Green Card Start Simultaneously



# General Green Card Process

## YALE Process

EB-2 or EB-1  
preparation =  
I-140 Approval

Fac Member,  
Family Members  
& Attorney:  
Adjustment  
(I-485)

Work Permit,  
then Green Card

H-1B Must Continue Throughout





# EB-2 First Steps

## Advertisements

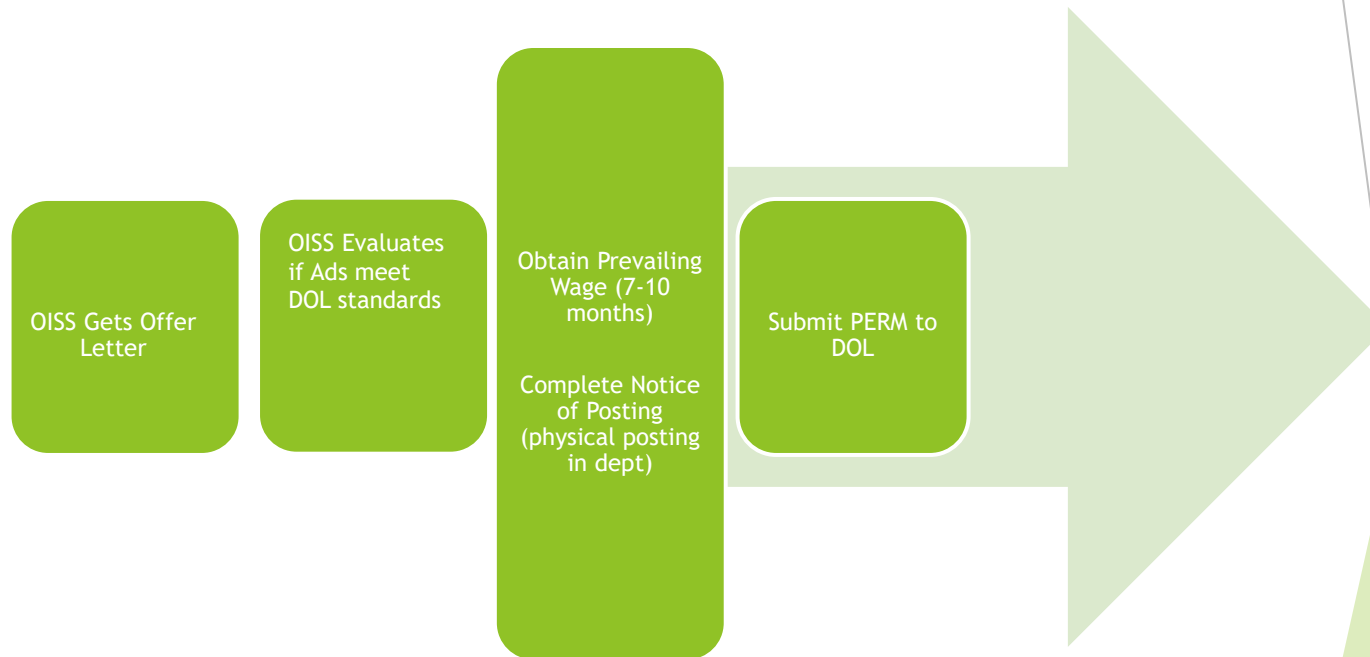
- Posted in JOURNAL
- Evidence of dates posted
- Meets DOL requirements

## Offer Letter

- Expires 18 months from the original offer date
- Government processing requires 8-10 months prior to the offer letter expiration\*

\*Therefore, the real deadline is to get OISS the offer letter no later than 6 months from issuance of the "original" (not revision)

# 18 Month Deadline



# Inform OISS

- ▶ Share the ad draft before it is posted
  - ▶ If you know there will be international candidates, or
  - ▶ If at least one finalist is international candidate
  - ▶ In some cases the ad must be re-posted
- ▶ OISS can talk to candidates about transition/ family issues pre-offer
- ▶ Send OISS list of finalists if it appears to include international
- ▶ If an offer is issued to an international - send OISS copy
- ▶ 18-month deadline from OFFER - not start date

# Problem Areas

- ▶ If offer includes appointment prior to Assistant Professor
  - ▶ Still have 18 month *offer* deadline (regardless of AP start date)
- ▶ Advertisement content does not meet DOL requirements
  - ▶ Best = Mention field/department, imply teaching, require Ph D
- ▶ Advertisements not in “professional journal” (if in doubt put in Chronicle of Higher Education)
- ▶ Candidate did not have requirements at time of offer (e.g. ABD no degree)
- ▶ Letter is a “revision” and the original letter has past the 18-month deadline
- ▶ Missed deadline:
  - ▶ Must do again as “test of labor market”, or
  - ▶ Evaluate if EB-1 would work

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## Updates and Reminders

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### Academic Leaves

- **General Procedures**
  - **Changes, cancellations, and costing changes**
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## 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

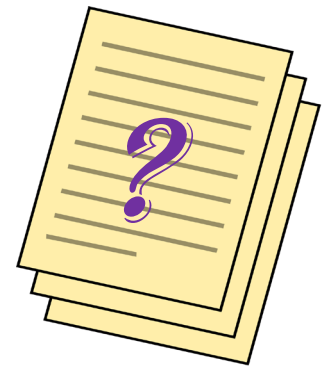


## Deadlines for approving transactions in Workday: October–May

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



## Payroll Schedule:

- All academics are paid Monthly.
- Dates are available online at [Payroll Schedule: Production and Paycheck Dates | It's Your Yale](#)
- Payroll sometimes completes early in the morning such as 6AM.
- OFAS may choose not to approve retroactive compensation changes the day before payroll runs.
  - Workday occasionally recalculates incorrectly.
  - Approving late does not allow time to review the entry for accuracy.



Reminder: All payroll questions and adjustments for faculty must be submitted to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) for review.





Supporting documents must be *merged* into a single pdf.

Merge all documents into a single PDF in the following order:

- Form, if included
  - E.g. Faculty Compensation Approval Form, Secondary Appointment Form, or Leave Form
- Appointment or offer letter or email exchange describing the arrangement
- All other supporting documents
  - CV, letters of recommendation, etc.

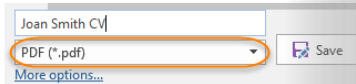
Use instructions on Administrative Processes page, Step 3  
(<https://facultyadmin.yale.edu/admin-processes>)

Yale Office of Faculty Administrative Services

## PDF 101

### Save/Export as a PDF File

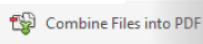
1. For documents in Microsoft Office, click **File**.
2. Select **Save As**.
3. Under the text box where you can input the file name, click the drop-down arrow on the "Save as type:" field.
4. Select **PDF (\*.pdf)** format from the drop-down menu to save your document as a PDF.




### Combine Multiple Documents into one PDF

1. For optimal success, convert any non-PDF documents to PDF using the instructions above.
2. Open Adobe Acrobat.
3. Select **Tools** from the tool bar.
4. Select **Combine Files**.
5. Add the documents that you want to combine from the appropriate locations on your computer.
6. Click **Combine**. This option will be at the top right for newer versions of Adobe and bottom right for older versions.
7. Save the document as a new PDF with the appropriate file name

Older version



Newer version



### Save a PDF with Multiple Signatures

Sometimes PDFs have hidden permissions, and do not save documents with multiple electronic signatures. Here is a suggested workaround if you receive an error message during the merger.

1. Click **File**, then select **Print**.
2. In the Printer drop-down menu, select **Adobe PDF** or **Microsoft Print to PDF**, whichever your software allows.
3. Click **Print**. Acrobat will not ask you to save the document, and you will launch the save screen.

Secondary appointments require a completed Secondary Appointment Form.

Possible exceptions for FAS: Follow procedures on FAS Dean's Office site at <https://fas.yale.edu/book/secondary-appointments>

- Note: The *end date* for a secondary appointment *cannot extend beyond the end date of the primary* appointment and is *limited to a maximum term of five years*.

Yale

OFFICE FOR FACULTY ADMINISTRATIVE SERVICES

[faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)

## Secondary Appointment Form

The purpose of this form is for collecting approvals of a secondary appointment when the appointment is being made in a department other than the primary appointment. The academic appointment can only be entered by the academic unit granting the appointment. If this secondary includes compensation, send this form along with the **Faculty Compensation Approval Form** to the primary department. Only the primary department can enter the compensation; the primary cannot add academic appointments in other units.

### Instructions:

1. Secondary department- Initiate appointment by obtaining secondary department chair's or dean's signature.
2. Secondary department- Forward signed form to primary department chair or dean for signature.
3. Primary department- Return signed form to secondary department.
4. If *Secondary department is in FAS*: Send form signed by both departments, as well as the faculty CV and the [department faculty vote form](#), to [fas.dean@yale.edu](mailto:fas.dean@yale.edu) with a copy to the relevant Senior Associate Dean for final approval. (Humanities: John Mangan, Sciences: Robert Burger)
5. Secondary department- Enter into Workday. Sign and send signed form to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu).

Date Initiated:

  
(mm/dd/yyyy)

Proposed Candidate's Name:

### Primary Appointment

Primary Department Name:

Rank in Primary Department:

Term in Primary Department:

Start Date

  
(mm/dd/yyyy)

End Date

  
(mm/dd/yyyy)

### Secondary Appointment

Secondary Department Name:

Rank in Secondary Department:

Term of Appointment:

Start Date

  
(mm/dd/yyyy)

End Date

  
(mm/dd/yyyy)

Note: This end date cannot extend beyond the end date of the primary appointment, and is limited to a maximum term of five years.

This appointment includes compensation:

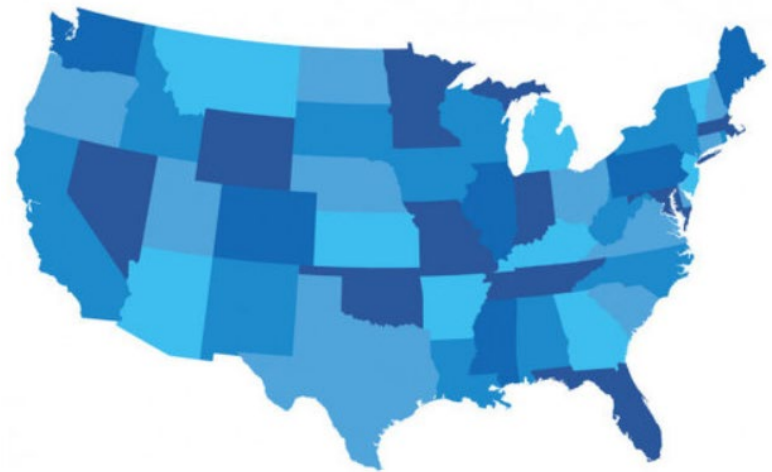
- Working out-of-state can trigger a range of tax and compliance implications
- Faculty member should notify department's business office or operations manager

Policies, procedures and forms regarding out-of-state work locations:

- <https://your.yale.edu/policies-procedures/policies/3505-out-state-work-locations>

Workday training guide: Change Job:  
Change Work Location (Alternate Work Location)

- <https://workday.training.yale.edu/training-materials/change-job-change-work-location-alternate-work-location>



In Workday, this is a two step process:

**Step 1** – Change Work Location

**Step 2** – Change Contact Information for Alternate Work Location

**Note:**

- The ***Effective Date*** must be the ***first of the month*** if the Alternate Work Location is outside Connecticut or the US.
  - If removing the Alternate Work Location, it is not possible to set the Effective Date. Thus, notify OFAS to set the correct date.

If you receive a **red Error message** instructing you to use a later date, send email to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu).

Consequence of not using first of the month:

- Pay splits into subperiods
- Allowance plans will pay multiple times, once for each subperiod, resulting in an overpayment

Example of a faculty member who had subperiods.

This screenshot is from the Workday report, *Payroll Results Verification With Costing – Yale*.

Base Annual Salary	Pay Group	Payroll Result	Pay Component	Transaction Debit Amount
63,000.00	M Monthly	: 06/09/2020 (Regular) - Complete	Regular Salary Academic Pay	\$1,670.46
				Total: \$1,670.46
63,000.00	M Monthly	: 06/30/2020 (Regular) - Complete	Regular Salary Academic Pay	\$5,250.00
				Total: \$5,250.00
63,000.00	M Monthly	: 06/30/2020 (Regular) - Complete	Regular Salary Academic Pay	\$3,579.54
				Total: \$3,579.54

A decorative border of autumn leaves, including maple leaves in shades of yellow and orange, surrounds the central text box.

# Academic Leaves

Academic Leaves refers to *research leaves* – e.g. Triennial, Sabbatical, etc.

## Faculty of Arts and Sciences (FAS)

- Non-Tenured ladder faculty (Asst Prof and Assoc Prof on Term) leaves – memo to be sent from FAS Dean's Office
  - Requests submitted through Interfolio RPT module using type ***Sabbatical***
- Tenured faculty – memo to be sent from Diane Rodrigues directly to all ladder faculty

*Professional Schools* – memo to be sent from Diane Rodrigues to school deans and school administrators

General Procedures online at  
<https://facultyadmin.yale.edu/academic-career-events/leaves-teaching-relief>

- Includes revised request forms for Academic Year 2022-23 as well as current forms for Academic Year 2021-2022
- Helpful information regarding *unpaid leaves*

Ad hoc leave or time off requests and changes during academic year

- Send to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)





## Leave changes or cancellations

- FAS - Deferrals require permission from the cognizant FAS dean
- OFAS will need to change dates or cancel the leave
- Changes to leaves in Workday do not trigger a task to update costing, i.e. FacSabbatical costing treatment



