Office of Faculty Administrative Services (OFAS)

Information Session

October 28, 2020

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

Agenda

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Updates and Reminders
- Deadlines
- Supporting documents
- Secondary Appointments
- Extensions due to COVID-19
- Faculty Retirements and Emeritus Faculty

Changes to location and contact information

Updates to Workday Training Guides

Academic Leaves
- General Procedures
- Deferrals and costing changes

Interfolio
- General Updates (Audrey Bribiescas)
- Non-tenured ladder faculty leave process (Sara Wilhelm)

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.

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Supporting documents are forwarded to deans and provosts for approval.

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)

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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.

Joan Smith CV
PDF (*.pdf)
More options...
Save
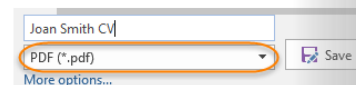
Combine Multiple Documents into one PDF
1. For optimal success, convert any non-PDF documents to PDF using the instructions above.
2. Open Adobe Acrobat.
3. Select **Tools** from the tool bar.
4. Select **Combine Files**.
5. Add the documents that you want to combine from the appropriate locations on 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
Combine Files into PDF

Newer version
Combine Files
Open

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.

Secondary appointments for which an appointment letter has not been generated require a completed Secondary Appointment Form

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.

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OFFICE FOR FACULTY ADMINISTRATIVE SERVICES
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 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.

Date Initiated: [   ]
(mm/dd/yyyy)
Proposed Candidate's Name: [   ]

Primary Appointment

Primary Department Name: [   ]

Rank in Primary Department: [   ]

Term in Primary Department: Start Date [   ]   End Date [   ]
(mm/dd/yyyy)   (mm/dd/yyyy)

Secondary Appointment

Secondary Department Name: [   ]

Rank in Secondary Department: [   ]

Term of Appointment: Start Date [   ]   End Date [   ]
(mm/dd/yyyy)   (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: [Compensation?]

Update – Extensions due to COVID 19

➤ March 2020 – Provost announced that Yale would provide a one-year extension for certain eligible tenure-track faculty

Provost's announcement - https://research.yale.edu/provost-announcement-tenure-policy-adjustments

➤ FAS and YSM extensions have been uploaded to Workday

➤ Professional School extensions are also being handled centrally

Appointment Information

Track	P - Primary - History of Art - Assistant Professor
Track Type	FASTAP 2016
Track Type Category	Ladder
Reason	Update Academic Appointment > Extension > Spring 2020 Pandemic
Rank	Assistant Professor
Appointment Specialty	(empty)
Constructed Title	Assistant Professor
Title	Assistant Professor
End Date	06/30/2025

Tenure Status	Term
Tenure Track Start Date	07/01/2019
Probationary End Date	06/30/2028
Tenure Award Date	(empty)

Supporting Information

Current Appointments 1 item

Academic Unit	Track Type
History of Art	Ladder >> FASTAP

Current Positions 1 item

Faculty retirements have increased this year

Procedures for processing these are online at
https://facultyadmin.yale.edu/academic-career-events/separation-and-retirement

If the faculty member is eligible for emeritus status as defined in the Faculty Handbook, section XXI.Q, OFAS will make the changes in Workday

The Henry Koerner Center, designed for the benefit of emeriti faculty

Changes to Location and Contact Information

Refer to October 15, 2020 memo from Provost regarding *Faculty Out-of-State Work During the COVID-19 Pandemic*

https://provost.yale.edu/news/faculty-out-state-work-during-covid-19-pandemic

- Working out-of-state can trigger a range of tax and compliance implications

- Faculty member should notify department's business office or operations manager
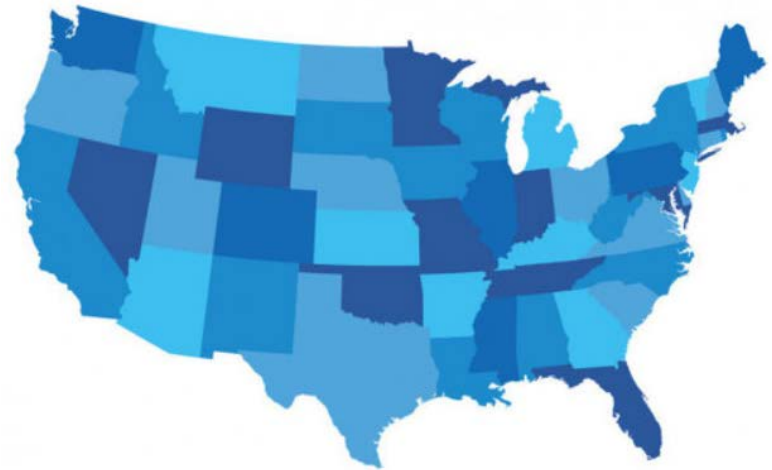
Policies, procedures and forms regarding out-of-state work locations:

- 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

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* following approval from the Out of State Work Committee if the work location is not a Yale address.

If you receive a red Error message instructing you to use a later date, send email to faculty.admin@yale.edu.

Below is screenshot of a faculty member who had subperiods in his June pay. This screenshot is from the Workday report, *Payroll Results Verification With Costing – Yale*. There are multiple lines for Regular Salary and one of the Payroll Results contains a date that is mid-month.

Base Annual Salary	Pay Group	Payroll Result	Pay Component	Transaction Debit Amount
63,000.00	M Monthly	_____ l: 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

Updates to
Workday Training Guides

Workday Training Guides

Workday @ Yale Training - https://workday.training.yale.edu/
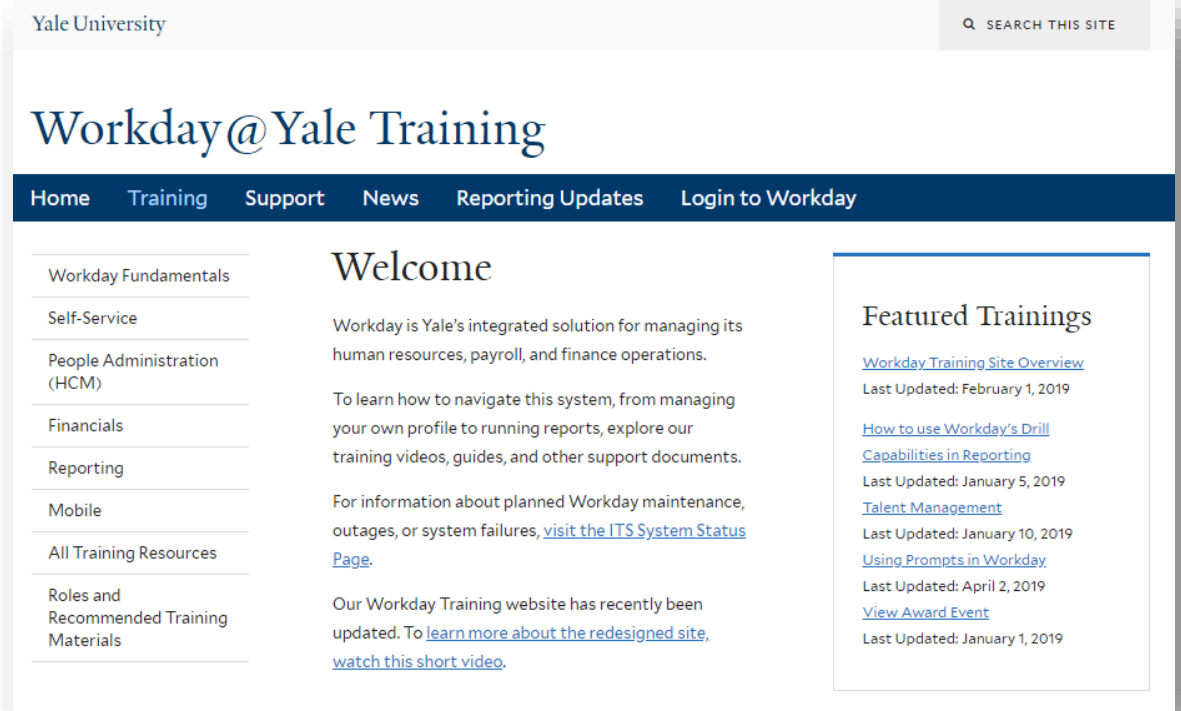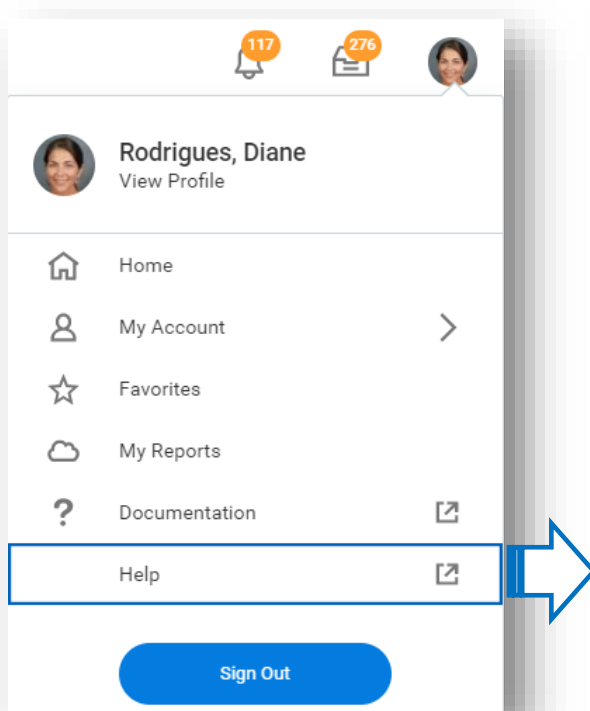
- Consolidation – Similar topics are being consolidated into a single guide to reduce the need to seek the right guide
  - Hiring and contracting contingent workers
  - Change Job
  - Academic Tracks and Reason Codes

- Update to guide, Termination/Separation: Employee (Academic)
  - Note: The Termination Date is either the last day that the faculty member worked, or the last day of the month for teaching faculty, not the next day.
    - Not first day of next month to avoid providing benefits without funds to cover

Academic Leaves

Academic Leaves

- General Procedures online at
  https://facultyadmin.yale.edu/academic-career-events/leaves-teaching-relief
  - Includes revised request forms for Academic Year 2021-22 as well as current forms for Academic Year 2020-21

  - Teaching Relief for Child Rearing
    - Non-ladder instructional faculty – Length increased from 8 weeks to entire semester
      - Provost's memo, 10/7/2020 -
        https://faculty.yale.edu/news/parental-benefits-non-ladder-instructional-faculty
    - Use Request for Leave or Teaching Relief form - Faculty member must indicate the actual or anticipated date of the birth or adoption

Deferrals and costing changes

- Deferral, or postponement, requests have increased due to travel restrictions

- Deferrals require permission from the cognizant 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. FacLOA worktag

Interfolio

- Interfolio, Discontinuing Support for Internet Explorer

- Updates RPT - External Evaluator experience

- Departments can run a version of the eeo reports and look at the Referral Source:
    - Faculty
    - Staff
    - Fellowship
    - Other

- From October 14,2020 release notes: Interfolio has removed Internet Explorer from their list of compatible and supported browsers.
    - Microsoft will be discontinuing active support for Internet Explorer 11 in the coming year
    - Today, only about 2% of all Interfolio usage takes place through Internet Explorer 11.

- Strongly encourage to use current versions of today's leading web browsers, such as: Google Chrome, Mozilla Firefox, or Safari –

Former evaluator experience

New evaluator experience

Yale University is conducting a review of Name of candidate and has requested a Confidential Evaluation.

I ACCEPT

I DECLINE

If you have questions about this request, please contact pamela.bosward@yale.edu.

Dear Professor I

Powered by Interfolio | Support (Ref. #: 73FC8D2050)

Interfolio Demo University is conducting a review of Virginia Apgar and has requested a Confidential Evaluation.

VIEW REQUEST

Interfolio Demo University asks that you submit your Confidential Evaluation by **Oct 17, 2020**. If you have questions about this request, please contact josh.gianitsis@interfolio.com.

Dear Audrey,

Words

Fancy words

~Dean

Powered by Interfolio | Support

- From RPT Release Notes September 2020

RPT - New improved evaluator landing page

Confidential Evaluation Request for >

Name of candidate

Request Details

Type
Confidential Evaluation

Requested by
Interfolio Alpha University

Message from Interfolio Alpha University
Thank you for agreeing to serve as an outside evaluator of the application for tenure and promotion to Associate Professor of Painting.

Decision

I **will** submit an evaluation.
Due September 26, 2020

I Accept

I will **not** submit an evaluation.

I Decline

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- Once an evaluation request has been accepted, evaluators are now able to download shared materials without logging in or read materials in the reader.

Confidential Evaluation Request for >

Jaco Bassman

Request Details

Type	Requested by
Confidential Evaluation	Interfolio Alpha University

Message from Interfolio Alpha University

Thank you for agreeing to serve as an outside evaluator of the application for tenure and promotion to Associate Professor of Painting.

Supporting Materials   Read All Materials

Name	Action
Syllabus	Download

EEO Reports

Referral Source

- EEO Reports for your search committee if needed for discussions
  - Downloaded as CSV file or PDF
  - Send a via a Report Link
- Plus, there is also the referral source graph.

C1. Select, Unit
C2. Select, Position,
C3. Select, Yale EEO-1/Affirmative Action Voluntary Self Identification Form

D.) Click on View Report button and/or download as a CSV file. Or Report Link

Unit version of the EEO report

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Reports

Applications Report | Positions Report | Form Report | Logs ?

Yale EEO-1/Affirmative Action Voluntary Self Identification Form

Selected Position
Tenure-Track Faculty Position in Racism and Health

New Report

1. 1. Gender

Answer Information	# of Responses	Response %
Female	37	57%
Male	27	42%
Other	1	2%
I don't wish to answer	0	0%
Total	65	100%

2. 2. Ethnicity

Answer Information	# of Responses	Response %
I am Hispanic / Latino/a.--A person having origins of Cuban, Mexican, Puerto Rican, Central or South American or other Spanish culture or origin, regardless of race.	11	17%
I am not Hispanic / Latino/a	54	83%
I don't wish to answer	0	0%
Total	65	100%

3. 3. Race

Note: Numbers in parentheses indicate the number of responses that were part of a multiple-selection answer.

Answer Information	# of Responses	Response %
American Indian or Alaskan Native--A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.	4 (1)	6%
Asian--A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam	12 (1)	18%
Black or African American--A person having origins in any of the Black racial groups of Africa.	21 (2)	31%
Native Hawaiian or Other Pacific Islander--A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.	0	0%
White/Caucasian--A person having origins in any of the original peoples of Europe, the Middle East or North Africa.	22 (2)	32%
I don't wish to answer	9	13%
Total	68	100%

Applicant Information	# of Applicants	Applicants %
Applicants that responded with multiple answers	3	5%
Total applicants that responded	65	100%

Yale EEO-1/Affirmative Action Voluntary Self Identification Form

Report generated on Aug 10, 2020

Total Applicants	Department
17	Radiology and Biomedical Imaging (ID: 24699)
	Position
	Neuroradiologist (R-38, R-39, R-45)

Applicant Summary   **All Questions**

Gender

Total	Male	Female	Declined [1]	Other
17	11	5	1	0
100%	65%	29%	6%	0%

[1] Declined means the applicant chose the option "Don't wish to answer" for the specific question.

Underrepresented Minority

Total	URM [1]
17	2
100%	12%

[1] URM includes: Hispanic/Latino (any race), American Indian/Alaskan Native, Black/African American, & Native Hawaiian/Pac Islander.

Disability Status

Total	Has (or Had) Disability	No Disability	Declined [1]
17	0	17	0
100%	0%	100%	0%

[1] Declined means the applicant chose the option "Don't wish to answer" for the specific question.

Veteran Status

Total	Veteran	Not a Veteran	Declined [1]
17	0	17	0
100%	0%	100%	0%

[1] Declined means the applicant chose the option "Don't wish to answer" for the specific question.

Race / Gender

	Total	American Indian or Alaskan Native	Asian	Black or African American	Native Hawaiian or Other Pacific Islander	White	Multiple Selected (Two or More Races)	Declined [2]
Male	11		2	1		6		2
Female	5		4			1		
Declined	1							1
Other	0							
Total	17	0	6	1	0	7	0	3
Percentage	100%	0%	35%	6%	0%	41%	0%	18%

[1] Declined means the applicant chose the option "Don't wish to answer" for the specific question.

Ethnicity / Gender

	Total	Hispanic / Latino/a [1]	Not Hispanic / Latino/a	Declined [2]
Male	11	1	8	2
Female	5	0	5	0
Declined	1	0	0	1
Other	0	0	0	0
Total	17	1	13	3
Percentage	100%	6%	76%	18%

[1] In this table, "Hispanic/Latino" includes Hispanics/Latinos of all races.
[2] Declined means the applicant chose the option "Don't wish to answer" for the specific question.

Under Position Actions, select View referral sources

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Have a wonderful weekend!

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