

# Office of Faculty Administrative Services (OFAS)

## Monthly Information Session

November 10, 2017

## Reminders and Updates

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### Faculty Leaves

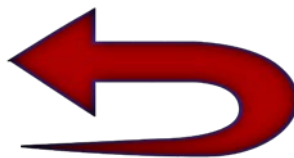
- **Types and Eligibility**
  - **Policies**
  - **Procedures**
- 

### Annual Faculty Activity Reports

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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 may be sent back.



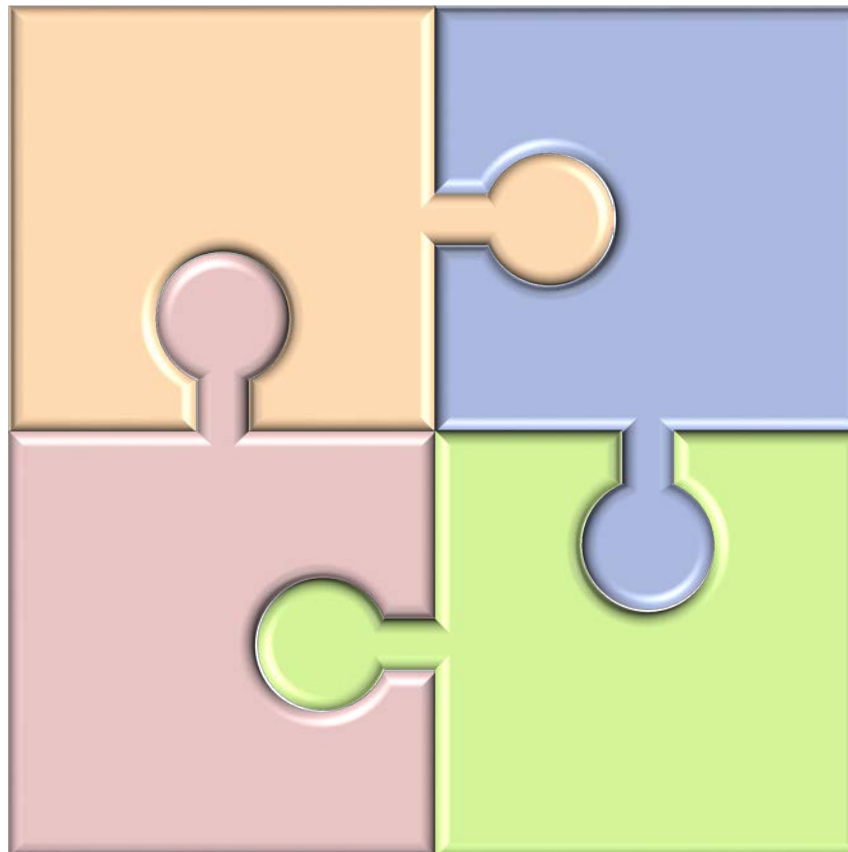
## OFAS Administrative Procedures Model

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](mailto:faculty.admin@yale.edu) and receive ticket number for tracking.

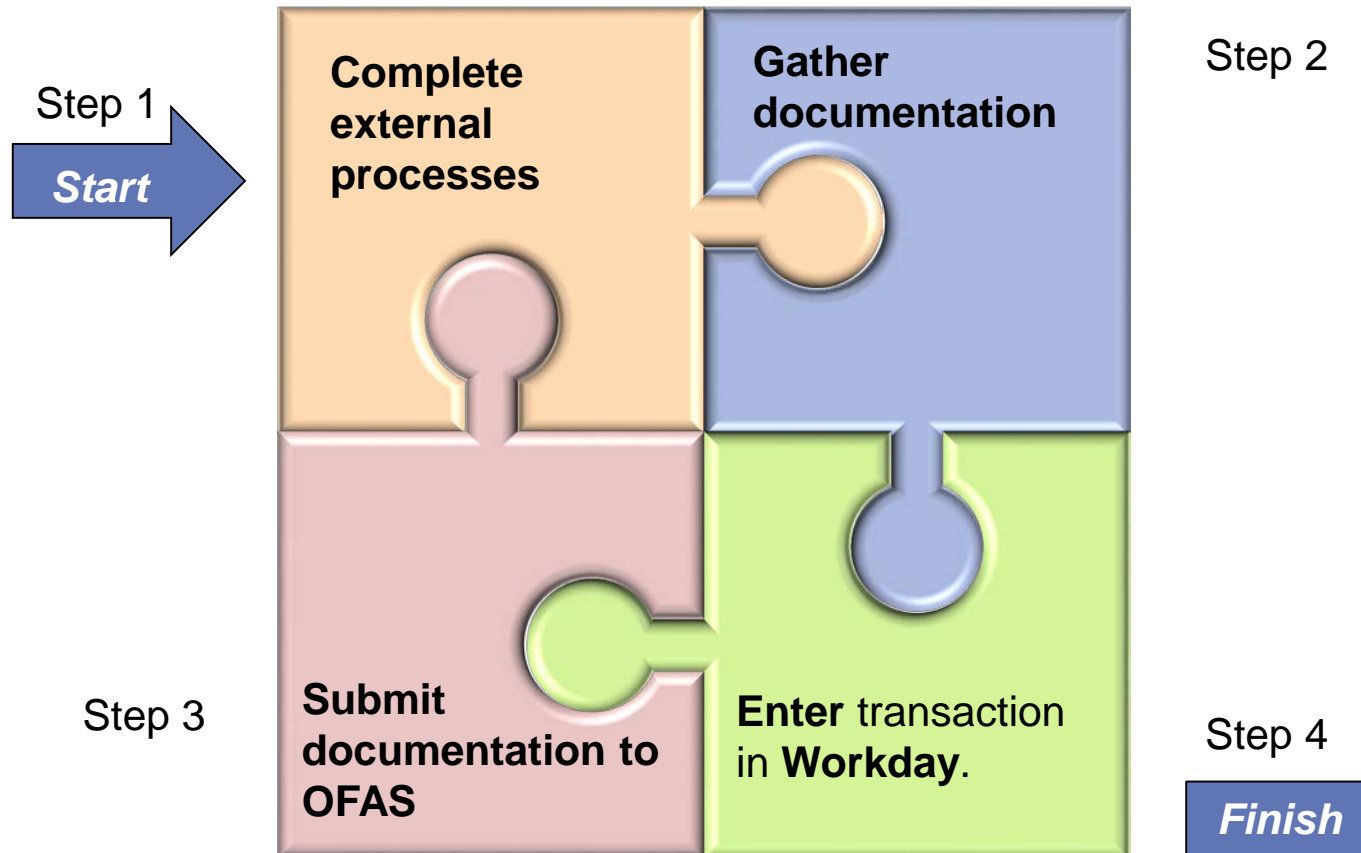


**Documentation –**  
Charging Instructions (if compensation), Signed Offer Letter, recommendation letters, CV, etc.

**Submit** transaction in **Workday**.

## OFAS Administrative Procedures Model

For additional information, refer to the [Administrative Processes](#) page on the OFAS website.



## Supporting Documentation



- ✓ Fully executed letter from a Dean or Director containing

1. *Description of Work, including*
  - a) Appointment rank
  - b) Academic unit
2. *Dates – Start and End*
3. *Compensation amount, if any*

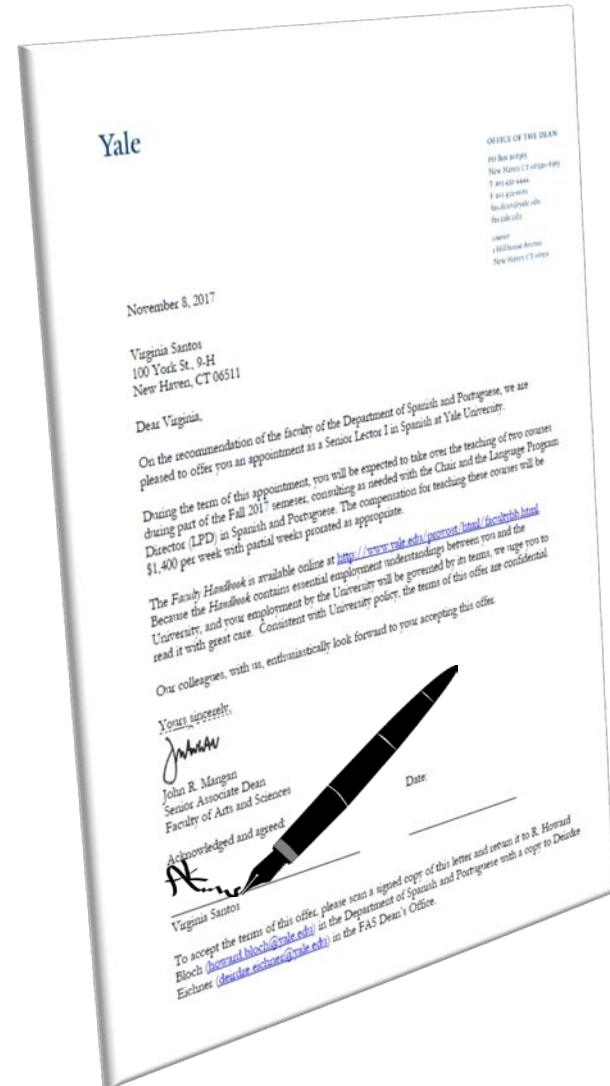


- ✓ If Compensation, [Faculty Compensation Approval Form](#)
  - *Amount* must match the amount in accompanying letter
  - *Dates* must match those in the letter
- ✓ If FAS, refer to [FAS Chart of Required Documents](#)

## Supporting Documentation (additional information)

*Fully Executed* = All who need to sign  
have signed

If the offer letter has a *signature line*  
for the faculty member to sign to  
accept the offer, you must send the  
signed version.







## Workday change to ladder faculty appointments

- For FAS term faculty, i.e. rank is either Assistant Professor or Associate Professor on Term
  - Need to add Academic Review Date which is within 2 years of Term End Date

**Additional Appointment Information**

Adjusted Title Start Date	(empty)
Academic Review Date	07/01/2020
Track Start Date (Override)	(empty)

**View Academic Appointment**

Academic Appointee: Levine, Naomi Grierson

Start Date: 07/01/2017

Academic Unit: English

Employment Position: P256493 Assistant Professor - Levine, Naomi Grierson

**Appointment Information**

Track: P - Primary - English - Assistant Professor

Track Type: FASTAP 2016

Track Type Category: Ladder

Reason: Update Academic Appointment > Change of Appointment Details > Appointment Additional Data

Rank: Assistant Professor

Appointment Specialty: (empty)

Constructed Title: (empty)

**Title: Assistant Professor**

End Date: 06/30/2022

Identifier: P - Primary

Position Number: 000000000

Job Profile: Assistant Professor

Roster Percent: 0.00%

Related Academic Unit: (empty)

**Additional Appointment Information**

Adjusted Title Start Date: (empty)

Academic Review Date: 07/01/2020

Track Start Date (Override): (empty)

**Additional Data**

FASTAP Decision

Decision Date: 06/10/2017

FASTAP Selection: FASTAP 2016

**Tenure Information**

Track Is Tenure Eligible: Yes

Tenure Home: English

Tenure Status: Term

Tenure Track Start Date: 07/01/2017

Probationary End Date: 06/30/2025

Tenure Award Date: (empty)

**Supporting Information**

Current Appointments: 1 item

Academic Unit	Track Type	Title	S
English	Ladder >> FASTAP 2016	Assistant Professor	0

Future Dated Appointments: 1 item

Academic Unit	Track Type	Title	S
English	Ladder >> FASTAP 2016	Assistant Professor	0

Current Positions: 1 item

Supervisory Organization	Current Position
English - Office of the Chair (Anthony, Susan B)	P256493 Assistant Professor

## FASTAP decisions for FAS ladder faculty

- Eligible FAS faculty chose between FASTAP 2007 and FASTAP 2016
  - Track Type Category = Ladder
  - Track Type = Ladder or FASTAP 2016
- Decisions are being tracked on the Additional Data

**View Academic Appointment**

Academic Appointee: Levine, Naomi Grierson

Start Date: 07/01/2017

Academic Unit: English

Employment Position: P256493 Assistant Professor - Levine, Naomi Grierson

**Appointment Information**

Track: P - Primary - English - Assistant Professor

Track Type: FASTAP 2016

Track Type Category: Ladder

Reason: Update Academic Appointment > Change of Appointment Details > Appointment Additional Data

Rank: Assistant Professor

Appointment Specialty: (empty)

Constructed Title: (empty)

Title: Assistant Professor

End Date: 06/30/2022

Identifier: P - Primary

Position Number: P256493

Job Profile: Assistant Professor

Roster Percent: 0.00%

Related Academic Unit: (empty)

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Tenure Home: English

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**Supporting Information**

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Academic Unit	Track Type	Title	S
English	Ladder >> FASTAP 2016	Assistant Professor	0

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Academic Unit	Track Type	Title	S
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Current Positions: 1 item

Supervisory Organization	Current Position
English - Office of the Chair (Anthony, Susan B)	P256493 Assistant Professor

**Additional Appointment Information**

Adjusted Title Start Date: (empty)

Academic Review Date: 07/01/2020

Track Start Date (Override): (empty)

**Additional Data**

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Decision Date: 06/10/2017

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Info session presentations are available online at

<http://facultyadmin.yale.edu/monthly-information-session-presentations>

OFAS Training sessions

- Posted on OFAS calendar
- TMS for registration

**FACULTY LEAVES:  
TYPES AND ELIGIBILITY**



## Definitions

**Leave** = Time away from all duties.

**Teaching Relief** = Only excused from teaching. All other duties must be met to the extent possible.

**Work Reduction** = Typical Yale work is reduced for a period of time.

### Academic and Paid Leaves

- Associate Professor Leave
- Junior Faculty Fellowship
- Morse Fellowship
- Professional Development Non-Ladder
- Reappointment Leave (New)
- Research Faculty Parental
- Faculty Sabbatical
- Senior Faculty Fellowship
- Special Non-Ladder Leave
- Faculty Special
- Faculty Special Triennial
- Faculty Triennial

### Teaching Relief/ Work Reduction

- Faculty Short-Term Medical Disability
- Phased Retirement Work Reduction
- Secondment
- Teaching Relief Child Rearing

### Unpaid Leaves

- Caregiver (FMLA only)
- Child-Rearing
- Military
- Public Service
- Leave WO Salary

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## Most Common Academic Leaves

Leave Type	Eligible ranks	Notes
Triennial (TLA)	Professors and Assoc Prof, tenured only	One paid term after 5 terms of teaching
Junior Faculty Fellowship (JFF)	Assistant Professors	Full year paid; must submit research proposal
Morse Fellowship	Assistant Professors	Full year paid; must submit research proposal
Associate Professor Leave (APL)	Associate Professors on Term	Full year paid; must submit research proposal
Reappointment Leave	Assistant Professors	Full year paid; must submit research proposal. FASTAP 2016 only.



## Less Common Academic Leaves - Paid

Leave Type	Eligible ranks	Notes
Sabbatical	Professors and Assoc Prof, tenured and adjunct	One term or full year, but only one semester of pay. If full year, may supplement income with other employment.
Special	Ladder faculty only	One term or full year, for special circumstances only.
Special Triennial	Professors and Assoc Prof, tenured only	Full year, but only one semester of pay. Must have a paid fellowship.
Senior Faculty Fellowship	Professors and Assoc Prof, tenured and adjunct	Full year. Paid amount half way between base pay for rank and actual salary.
Special Non-Ladder Leave	Non-ladder ranks	One term, for special circumstances only.

## Less Common Academic Leaves - UNPAID

Leave Type	Eligible ranks	Notes
Leave WO Salary	Any ranks, appointments > 3 years and at Yale > 1 year	Benefits will be paid upon return, one month at a time
Leave WO Yale Salary	Any ranks, appointments > 3 years and at Yale > 1 year	Receives pay through Yale by outside funding.
Leave W Yale Salary	Any ranks, appointments > 3 years and at Yale > 1 year	Receives pay through Yale from special funding.

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## Faculty Statuses – partial work release or reduction; NOT leaves

Status	Eligible ranks	Notes
Phased Retirement	Professors on Phased Retirement	One term for 100% or full year at 50% for each of the 3 years on Phased Retirement
Teaching Relief for Child Rearing (TRC)	Ladder faculty only	One full term. Tenure-track faculty receive a one year extension of appointment and tenure clock.
Short-term Medical Disability	Full-time teaching faculty	Need note from physician providing period of incapacitation.

**FACULTY LEAVES:  
POLICIES**



## ***Key points...***

- Leave is a *privilege*, not a right. All leave requests must be approved by the Provost's Office.
- All faculty planning to take an academic leave must submit a leave request, preferably using the form, *Request for Faculty Leave*.
  - <http://facultyadmin.yale.edu/resources/leaves-teaching-relief>

Including...

- Faculty taking Phased Retirement work reduction
- Junior faculty who submitted research proposals
- Deadline to submit request forms: December 1, 2017

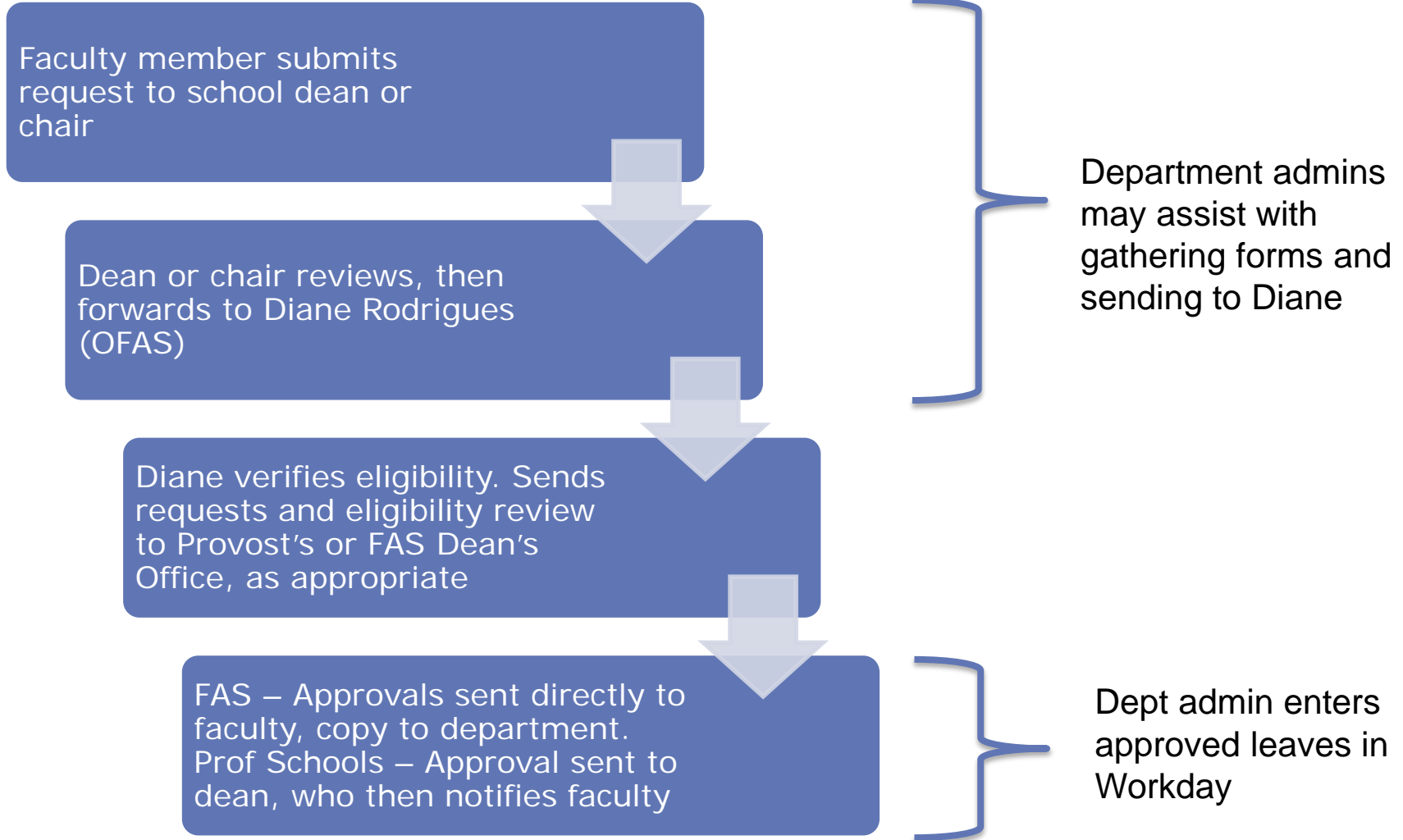
- No faculty member may be on leave, paid or unpaid, more than 4 semesters in 7 years, unless required by law
- Maximum period of a leave is one academic year.
- Leaves cannot be taken back to back.
- The faculty member must return to full teaching and administrative duties *for at least one year prior* to taking the next leave.
  - Exception: Faculty member retiring after leave is complete
- Faculty are not allowed to “bank”, i.e. save, leaves.
  - *Deferrals* can be requested for administrative service or to cover teaching.
- Any FAS faculty member who is successful in obtaining outside funding is eligible to receive one half of the resulting salary savings to Yale up to \$25,000 in an individual research account.

**FACULTY LEAVES:  
PROCEDURES**





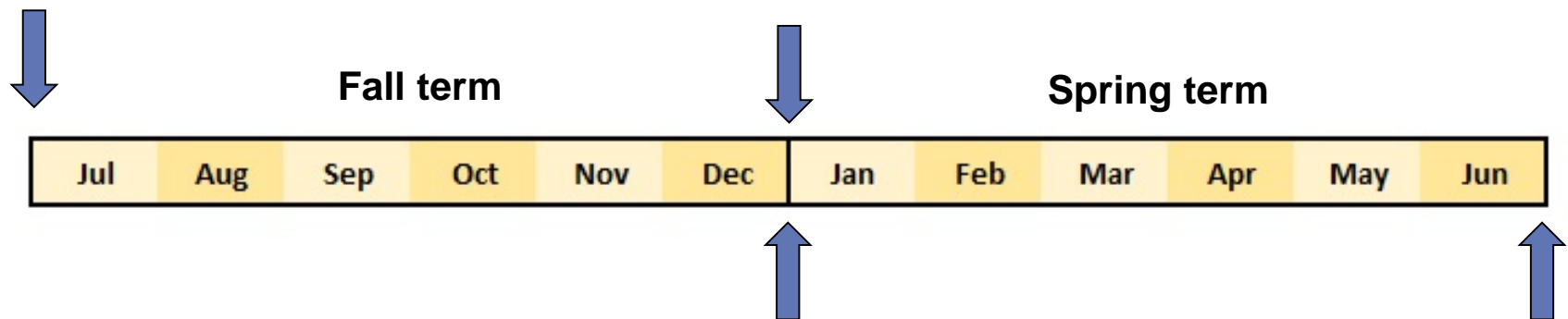
## Basic procedure for academic leaves:



## Basic procedure for academic leaves:

When entering leaves in Workday...

- As rule, all *academic leaves* span the entire term or year. That is, they *must begin on either July 1 or January 1* and *must end on either June 30 or December 31*.
- 30 days prior to the end date – In Workday, a *To Do* will go out to the Academic HR Support Specialist to return the faculty member from leave.



## Workday Leave Reports

*Academic - Employees on Leave, by Academic Unit - Yale*

*Academic – Ladder Faculty Leaves By Term – Yale*

*Academic – Non-Ladder Faculty Leaves By Term – Yale*

Faculty Name	Rank	Appt Type	Track Start Date	Ladder start date is after 07/01/2011	Track Type	F11	SP12	F12	SP13	F13	SP14	F14	SP15	F15	SP16	F16	SP17	F17	SP18	F18	SP19	Approval	
Alexandrov, Vladimir E	Professor Phased Retirement	Primary	07/01/1986		Ladder							TLA		PR				PR	TLA			12/19/2 to be ch.	
Bojanowska, Edyta M.	Professor	Primary	07/01/2017	Yes	Ladder																		
Bozovic, Marijeta	Assistant Professor	Primary	07/01/2013	Yes	FASTAP 2016									MOR	MOR		TRC						
Brunson, Molly	Associate Professor Tenure	Primary	07/01/2009		FASTAP 2016	MOR	MOR							APL	APL								

For more information regarding leaves - *Faculty Handbook*, Section XVII (<http://www.yale.edu/provost/handbook/>)

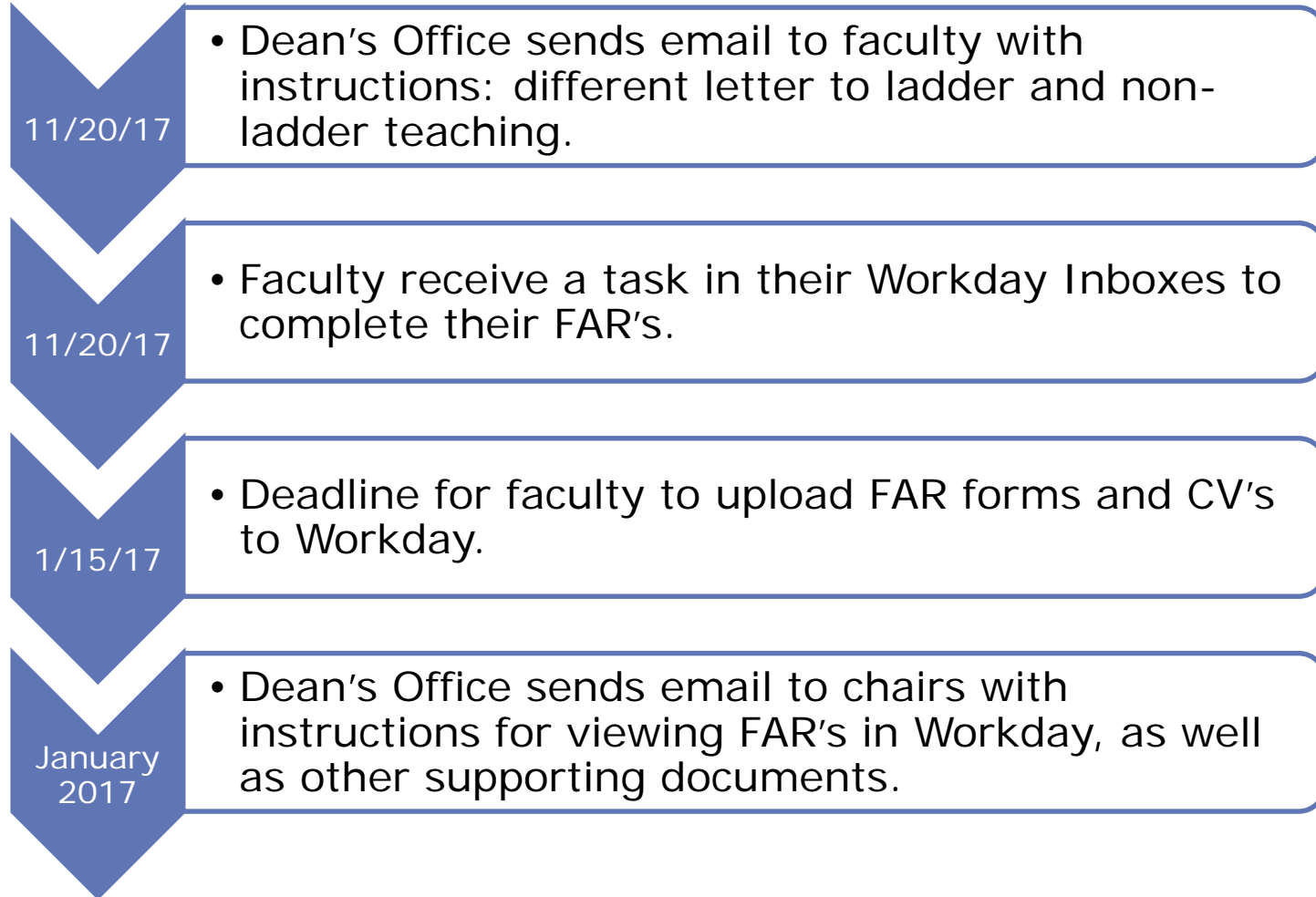
**ANNUAL FACULTY  
ACTIVITY REPORTING**

Each year, FAS faculty are required to complete their annual faculty activity reports, FAR's, highlighting their most notable professional activities for the past year.



The FAR's are used by department chairs and deans when reviewing annual merit increases for faculty.

## Timeline for 2017 FAR Process



## FAR's are required from the following:

- All ladder faculty
- All full-time, multi-year non-ladder teaching faculty
- Select non-ladder teaching faculty

## Two tracking Workday reports to track submission of documents:

- Ladder Faculty Activity Report Status
- Non-Ladder Faculty Activity Report Status



**FAR's are required from the following:**

- All ladder faculty
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**Two tracking Workday reports to track submission of documents:**

- Ladder Faculty Activity Report Status
- Non-Ladder Faculty Activity Report Status



**FAS Support Contact – *Nicole Gilmore*, FAS  
Dean's Office**