

**Office of Faculty Administrative
Services (OFAS)**

Monthly Information Session

November 13, 2015

- Housekeeping
- Leaves and Work Reduction
- FIS vs Workday
- OFAS support and tools
- Training options

- **Deadlines to submit transactions for processing, this includes submission of supporting documents**
 - FAS – 9th of every month
 - Professional schools – 15th of every month
 - November is a short month due to the holiday
- **All compensation transactions require the Charging Instructions Form**
 - The form and charts are on OFAS website at <http://facultyadmin.yale.edu/faculty-forms-and-their-uses>
- **Transactions in Workday that are more than 1 month old and missing supporting documents will be sent back.**



- Enter leave requests into Workday
 - FAS department chairs must be entered by the FAS Dean's Office
 - Use the training guide online at <http://workday.training.yale.edu/training-materials/leave-absence-academic-time>
- Send all request forms collected directly to diane.rodriques@yale.edu
 - Diane verifies eligibility and sends to FAS Dean's Office or Provost's Office for final decision
 - Approval messages are sent directly to faculty from school deans
 - OFAS enters leave approvals in Workday
- Leave policies are in the Faculty Handbook



To pull a list of approved and pending leaves in Workday, run the report **Academic – Employees on Leave, by Academic Unit – Yale**.

By altering the dates, it is possible to pull a history of leaves.

Academic - Employees on Leave, by Academic Unit - Yale

Instructions This report includes Leave Requests that have been approved and those that are pending (for the primary appointment), Academic Unit (for the primary appointment), Org Node (for the primary appointment), Academic Unit (for the primary appointment), Org Appointee.

Employee Type Faculty Other Academic

Academic Structure Node (Primary Appt)

Academic Unit (Primary Appt)

Track Type Category (Primary Appt)

Organizations *

Include Subordinate Organizations

Appointee

Leave Type

Include Leave Requests Pending Approval

On Leave Between 11 / 12 / 2015

And 05 / 12 / 2016

Work reduction - *These are not leaves.* These are entered into Workday by Faculty Affairs.

- *Teaching Relief for Child Rearing* (TRC) – Must submit required documentation on OFAS website
- *Phased retirement work reduction* – Can be taken as half year, full time or full year, half time
- *Short-term Medical Disability* – Must submit note from doctor as indicated in the Faculty Handbook
 - The note must include the period or dates of recuperation
 - Faculty are expected to return to some activities once recovered
- *Secondments* – Granted through special arrangement with Provost's or President's Offices, e.g. teaching at Yale-NUS

Teaching Relief for Child Rearing (TRC)

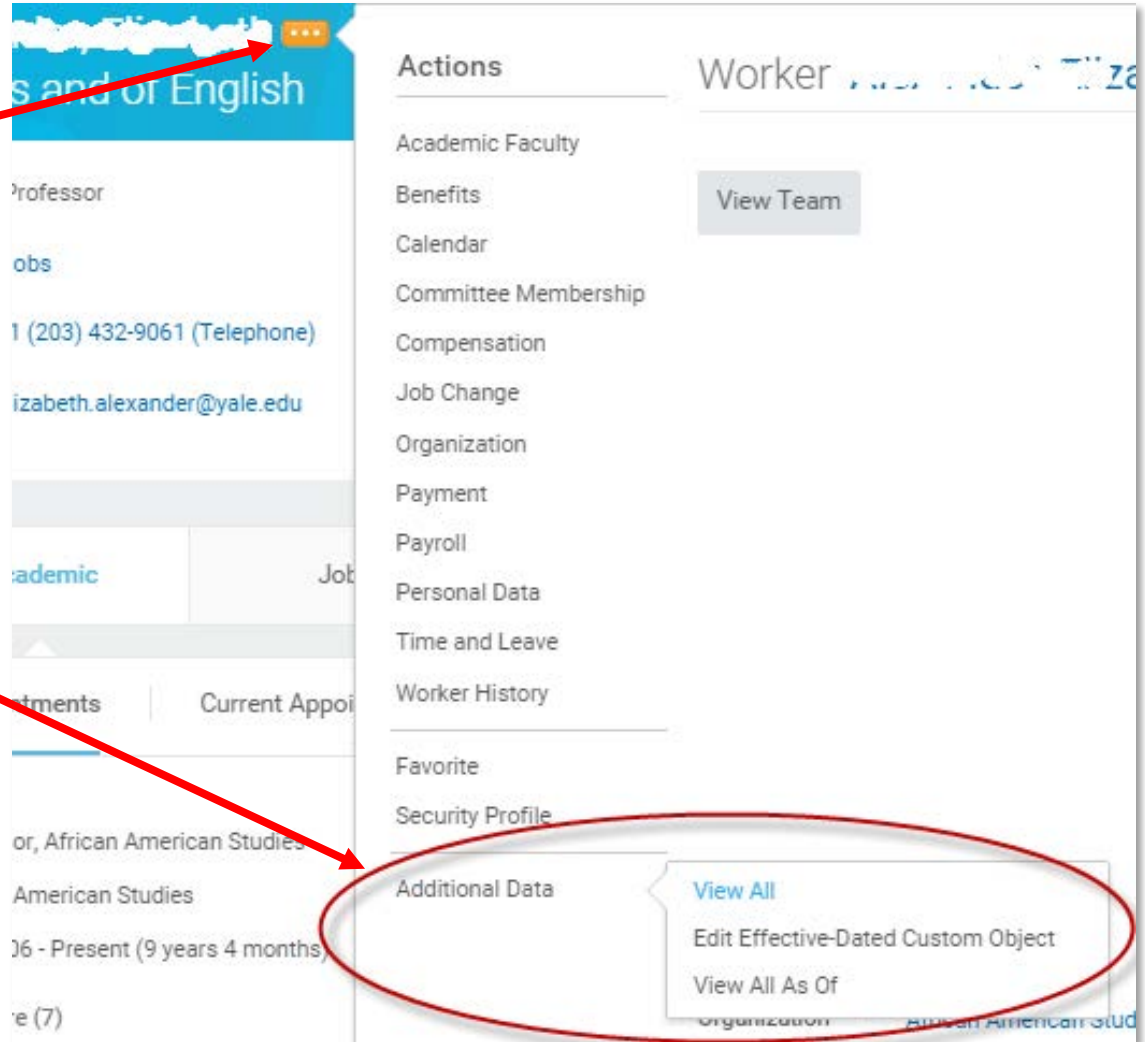
- This is only available to ladder faculty, tenured and tenure-track, in some schools.
- This is often confused with the Child Rearing Leave which is an unpaid leave.
- Tenure-track faculty are often eligible to extend the term of the current appointment and the tenure clock
- **NEW** instructions are on the OFAS website at <http://facultyadmin.yale.edu/resources/leaves-teaching-relief>



Phased Retirement Work

- Phased retirement is a 3-year program offered to ladder faculty who have been tenured at Yale for 10 years and are 65 and older.
- Faculty make arrangements directly with the Benefits Office.
- A copy of the contract is sent to the Provost's Office, the school dean and, if applicable, the FAS department chair, and OFAS.
- OFAS enters the appointment change into WD.
- The department must enter the periods of work reduction into WD.

Work Reduction is recorded as a faculty status and stored under *Related Actions* -> *Additional Data*.



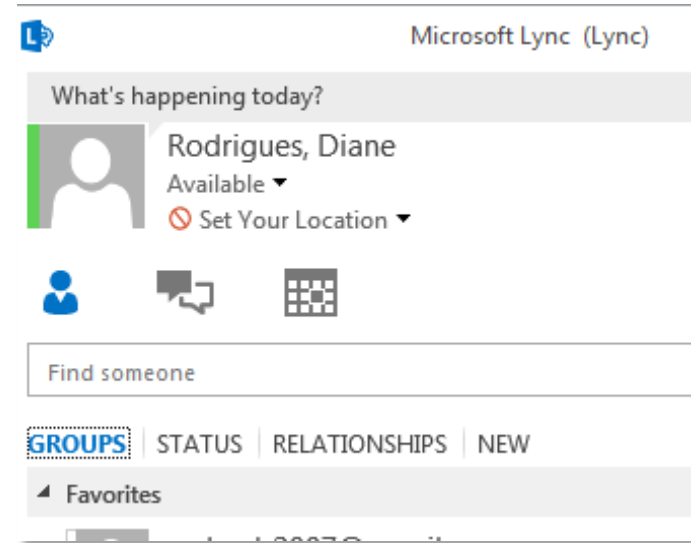
- Changes must go through another approval process.
- Cancellations should be sent to faculty.admin@yale.edu.

- FIS pulls appointment information from Oracle. Workday is now the official source of appointment data. Therefore, FIS appointment data is out of date.
- FIS can still be used to pull course information and committee information. It can also be used to look up inactive faculty.
- Access to FIS is only granted if there is a demonstrated need.

Help us, help you.



- **Lync** - Communication software that will allow sharing your desktop for the purpose of providing guidance with Workday transactions.
- Contact your desktop support to have this installed on your computer.



- Beginning on Monday, all email sent faculty.admin@yale.edu will submit a ticket to Salesforce.
- OFAS will begin using Salesforce regularly for all correspondence.
- Salesforce provides better tracking and monitoring of cases.

- **Workday**
 - **Weekly workshops**
 - Thursdays, 1:30 and 2:30 (register in TMS)
 - **Refresher Sessions**
 - Tuesday, 11/17, 1:30PM (register in TMS)
 - Repeat sessions - tbd
 - **Compensation training sessions - tbd**
- **Operations Manager Training Sessions**
- **Orientation sessions for new staff to Faculty Affairs**
- **Interfolio ByCommittee**
 - To be scheduled by Audrey Bribiescas



*****PLEASE withdraw or send email if you cannot attend a training session.***

- Questions?
- Topics for future sessions
- Questions, feedback, or suggestions for future meeting topics are always welcome
 - diane.rodriques@yale.edu
 - x6-1697