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
Housekeeping

- 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.
Leaves and Work Reduction

• 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.rodrigues@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.
Leaves and Work Reduction

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 Wo

• 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.
Leaves and Work Reduction

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

• 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 to 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.
Training options

- **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.**
Open discussion

• Questions?

• Topics for future sessions

• Questions, feedback, or suggestions for future meeting topics are always welcome
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  – x6-1697