Office of Faculty Administrative Services (OFAS)

Monthly Information Session

November 15, 2019
Agenda

Reminders and Updates

Interfolio updates

Faculty Leaves, Teaching Relief, and Work Reduction
  • Types and Eligibility
  • Policies
  • Procedures and Timelines
Reminders and Updates

All requests for on-demand payments must be submitted to OFAS (faculty.admin@yale.edu) to insure that the transaction has been accurately entered or corrected in Workday.

OFAS will submit to Payroll for processing.
Reminders and Updates

Updating faculty directory information

Supervisory org must update record in Workday

Andrew Bridy [NetID adb68]
Lecturer
Defaults to Job Profile

EMAIL: andrew.bridy@yale.edu
UPI: 17620721

UNIT: FAS Other FAS and Academic Departments
DEPARTMENT: FASPSC Political Science

LIMITED TO supervisory org and affiliated academic unit

PHYSICAL LOCATION:
115 Prospect Street
New Haven, CT 06511
Map It

BUILDING/DESK:
Rosenkranz Hall

MAILING ADDRESS:
Mathematics
PO BOX 208283
New Haven, CT 06520-8283
Reminders and Updates

Updating faculty directory information

Supervisory org must update the record in Workday
Reminders and Updates

Updating faculty directory information

Supervisory org can update using Change Business Title business process
Updating faculty directory information

Supervisory org can update using Change Business Title business process

Try to align with most recent change in appointment(s)
Reminders and Updates

Updating faculty directory information

If known, add room #
Reminders and Updates

Updating faculty directory information

Supervisory org can update using Change Location business process
Reminders and Updates

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Supervisory org can update using Change Location business process
Reminders and Updates

Updating faculty directory information

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Determined by Mail Code
Reminders and Updates

Updating faculty directory information

Supervisory org can update IDs under Personal information
Reminders and Updates

Updating faculty directory information

Supervisory org can update IDs under Personal information
INTERFOLIO UPDATES
Today’s topics

- Users & Groups
  - History of the two user lists
  - Reminder keep your lists and committees current
    - Faculty Search and RPT
    - Brief look at the how’s and whys
Back in the beginning...

For Review, Promotion and Tenure:
- Interfolio rolled-out in 2014, ALL FAS ladder faculty in 2014 were uploaded via a large file
- Why? Because RPT cases are reviewed by all the eligible voting faculty.
- Since there is not a automatic feed from WD to Interfolio; faculty have been added per requests to the User list. Perhaps in the future but for now keep requesting.

For Faculty Search:
- There was not a mass upload to the user list.
- Names were added when someone was selected to be on a search committee.
- Why? At that time and currently, not all faculty partake in the review of applications for a search. So the list is updated on a need to be added bases.
- So, keep requesting until we get an automatic update.
Send requests to:

If names are missing from the either list, please contact us and request to have a name added.

- Faculty.Admin@yale.edu - Office of Faculty Administrative Service

- FAS Dean’s office - fas.dean@yale.edu
  - Pam Bosward and Sara Wilhem

- Professional Schools - Tracy.Edwards@yale.edu
Faculty Search User List

- Faculty Search
  - Search Committee Members
  - Committee Manager(s)
- Review, Promotion and Tenure
  - Committees
  - Committee Members
  - Committee Managers
Adding a Search Committee Member
Adding a Committee Manager (CM), but first

- What is a CM?
  - A role that grants someone the ability to manage a search like an administrator but only that search.

- Who can get this role?
  - Faculty members
  - By default the one who creates the search.

- Why?
  - Because, this is the role for faculty members; the role administrators is not for faculty members

- When?
  - If a Search Chair or Department Chair needs or requests to have access to manage the search a little more closely.
  - Does not have to be given to all. Only if it helps and benefits the situation.
How to add a CM

1. Add Member
2. Add Manager
3. Users & Groups
Add the role and save
Go back to edit the search, add manager

- On the OFAS website
RPT: Committees

- Faculty Search
  - Search Committee Members
  - Committee Manager(s)

- Review, Promotion and Tenure
  - Committees - used in Cases via templates
  - Committee Members
  - Committee Managers
Review, Promotion & Tenure (RPT) - Committees

For your department/school, you should have six Standing Committees.

1. Dept Chair and Chair’s Assist or Dean and Dean’s Assist (~2 members)
2. Departmental Review Committee (~2 members standing PLUS Temporary - case specific)

Eligible departmental voting faculty committees:

1. All faculty
2. All Associate Professors and Professors
3. Tenured faculty
4. Full Professors

Standing committees are already in your case templates or can be pulled into a case step at any time.
Maintenance on the Standing Committees

Why?

- Faculty get
  - Promoted
  - Hired or appointed
  - Leave
- Cases need to be reviewed by all eligible voting faculty
  - We do not want to leave anyone off.
Edit the committee to update members
Adding and removing committee members

Click star for manager
X to remove
Adding members to a committee via the Case Details

Reviewing as
Dean and Dean's Assistant (School-Name)  

Committee Members (3)

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tracy Edwards</td>
<td><a href="mailto:tracy.edwards@yale.edu">tracy.edwards@yale.edu</a></td>
<td></td>
</tr>
<tr>
<td>Pamela Bosward</td>
<td><a href="mailto:pamela.bosward@yale.edu">pamela.bosward@yale.edu</a></td>
<td></td>
</tr>
<tr>
<td>Audrey Bribiescas</td>
<td><a href="mailto:audrey.bribiescas@yale.edu">audrey.bribiescas@yale.edu</a></td>
<td>Temporary</td>
</tr>
</tbody>
</table>
Via the Case Details

Unable to make a member a manager BUT you can recuse a member if needed.
Why do you see names non-Yale email addresses?

- Individuals that have appointment case will need to have their current and proper email

Therefore when updating your committee members always add the name with the @yale.edu
FACULTY LEAVES, TEACHING RELIEF, AND WORK REDUCTION
**Types and Eligibility**

**Leave** = Time away from *all* duties.
- Leaves can be fully paid, partial paid, or unpaid.
- Change accounting treatment to *FacLOA*

### Academic and Paid Leaves
- Associate Professor Leave
- Faculty Sabbatical
- Faculty Special
- Faculty Special Triennial
- Faculty Triennial
- Junior Faculty Fellowship
- Morse Fellowship *
- Professional Development Non-Ladder *
- Reappointment Leave *
- Research Faculty Parental
- Senior Faculty Fellowship
- Special Non-Ladder Leave

* Leaves for FAS only

### Unpaid Leaves
- Caregiver (FMLA only)
- Child-Rearing
- Leave WO Salary
- Leave WO Yale Salary
  - Outside funds paid through Yale payroll
- Military Service
- Public Service
Types and Eligibility

**Teaching Relief** = Only excused from teaching. All other duties must be met to the extent possible.
- Full pay continues without interruption
- No Accounting Treatment

**Work Reduction** = Typical Yale work is reduced for a period of time.
- Paid according to arrangements
- Salary may be charged to another account

<table>
<thead>
<tr>
<th>Teaching Relief</th>
<th>Work Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Faculty Short-Term Medical Disability</td>
<td>- Phased Retirement Work Reduction</td>
</tr>
<tr>
<td>- Teaching Relief Child Rearing</td>
<td>- Secondment</td>
</tr>
</tbody>
</table>
Types and Eligibility

Academic Leaves
# Types and Eligibility

## Most Common Academic Leaves

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Eligible ranks</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Triennial (TLA)                   | Professors and Assoc Prof, tenured only | • One semester paid  
• 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 in FASTAP 2016     | • One semester paid  
• Must submit research proposal                                         |
<table>
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<tr>
<th>Leave Type</th>
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<th>Notes</th>
</tr>
</thead>
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<tr>
<td>Sabbatical</td>
<td>Professors and Assoc Prof, tenured and adjunct</td>
<td>• One term or full year&lt;br&gt;• Only one semester of pay&lt;br&gt;• If full year, may supplement income with other employment</td>
</tr>
<tr>
<td>Special</td>
<td>Ladder faculty only</td>
<td>• One term or full year&lt;br&gt;• Special circumstances only</td>
</tr>
<tr>
<td>Special Triennial</td>
<td>Professors and Assoc Prof, tenured only</td>
<td>• Full year&lt;br&gt;• Only one semester of pay&lt;br&gt;• Must have a paid fellowship</td>
</tr>
<tr>
<td>Senior Faculty Fellowship</td>
<td>Professors and Assoc Prof, tenured and adjunct</td>
<td>• Full year&lt;br&gt;• Paid amount half way between base pay for rank and actual salary</td>
</tr>
<tr>
<td>Special Non-Ladder Leave</td>
<td>Non-ladder ranks</td>
<td>• One term&lt;br&gt;• Special circumstances only</td>
</tr>
</tbody>
</table>
### Less Common Academic Leaves - Unpaid

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Eligible ranks</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave WO Salary</td>
<td>• Any ranks</td>
<td>Benefits premiums to be paid upon return, one month at a time</td>
</tr>
<tr>
<td></td>
<td>• Appointments &gt; 3 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• At Yale &gt; 1 year</td>
<td></td>
</tr>
<tr>
<td>Leave WO Yale Salary</td>
<td>• Any ranks</td>
<td>Receives pay through Yale by outside funding</td>
</tr>
<tr>
<td></td>
<td>• Appointments &gt; 3 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• At Yale</td>
<td></td>
</tr>
<tr>
<td>Leave W Yale Salary</td>
<td>• Any ranks</td>
<td>Receives pay from special funding within Yale</td>
</tr>
<tr>
<td></td>
<td>• Appointments &gt; 3 years</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• At Yale</td>
<td></td>
</tr>
</tbody>
</table>
Teaching Relief and Work Reduction

Academic Statuses
# Teaching Relief and Work Reduction

<table>
<thead>
<tr>
<th>Status</th>
<th>Eligible ranks</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phased Retirement</td>
<td>Professors on Phased Retirement</td>
<td>One term for 100% or full year at 50% for each of the 3 years on Phased Retirement</td>
</tr>
<tr>
<td>Teaching Relief for Child Rearing (TRC)</td>
<td>Ladder faculty only</td>
<td>One full term. Tenure-track faculty receive a one year extension of appointment and tenure clock.</td>
</tr>
<tr>
<td>Short-term Medical Disability</td>
<td>Full-time teaching faculty</td>
<td>Need note from physician providing period of incapacitation.</td>
</tr>
<tr>
<td>Secondment</td>
<td>Ladder and non-ladder instructional faculty</td>
<td>Mostly used for Yale-Nus and very special circumstances</td>
</tr>
</tbody>
</table>
FACULTY LEAVES: POLICIES
Faculty leaves: Policies

Key points...

- Leave is a *privilege*, not a right. All leave requests must be approved by the Provost’s Office and the Dean’s Office.
- No more than 4 semesters of leave in 7 years
- Maximum period of a leave is one academic year
- Faculty are *not* allowed to “bank”, i.e. save, leaves
- Leaves cannot be taken back to back
  - At least one year of on campus teaching prior to next leave
    - *Exception:* Faculty member retiring after leave is complete
Due to the complexities and many nuances associated with leaves, please do not inform faculty of their leave eligibility prior to confirming with your dean’s office or my office.
FACULTY LEAVES: PROCEDURES AND TIMELINES
**All** faculty requesting a leave or teaching relief must submit a leave request, preferably using the form, *Request for Faculty Leave or Teaching Relief*

https://facultyadmin.yale.edu/resources/leaves-teaching-relief

**Includes:**
- Faculty on Phased Retirement to indicate work reduction
- *Tenure-track faculty (Assistant and Associate Professors)* who submitted research proposals to the dean’s office.

**Deadline to submit request forms to OFAS:**

- **November 26, 2019**

Note: In FAS, a 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.
Procedures and Timelines

Basic procedure for academic leaves:

NOTE: This includes tenure-track faculty who submitted research proposals to dean’s office. Only submit the leave request form to Diane Rodrigues (diane.Rodrigues@yale.edu).

Faculty member submits leave request to school dean or chair
Deadline: November 12, 2019

Dean or chair reviews, then forwards to Diane Rodrigues
Deadline: November 26, 2019

Diane verifies eligibility. Sends requests and eligibility review to Provost’s or FAS Dean’s Office, as appropriate (December 2019)

FAS - Approvals sent directly to faculty, copy to chair and assistant
Prof Schools - Approval sent to dean, who then notifies faculty (Jan/Feb 2019)

Dept admin enters approved leaves in Workday

Department admins assist with gathering forms and sending to Diane Rodrigues
Basic procedure for academic leaves:

When entering leaves in Workday...

- As a 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.
Procedures and Timeline

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*

For more information regarding leaves: *Faculty Handbook, Section XVII* ([http://www.yale.edu/provost/handbook/](http://www.yale.edu/provost/handbook/))
Procedures

Additional notes:

More information is on OFAS website
- [https://facultyadmin.yale.edu/academic-career-events/leaves-teaching-relief](https://facultyadmin.yale.edu/academic-career-events/leaves-teaching-relief)

All tenure track faculty (Assistant and Associate Professors) need to submit research proposals to the deans and must submit request forms to Diane Rodrigues.

Faculty who are up for promotion to Associate Professor and will be applying for APL, should still submit the form.

If necessary, leaves will be approved contingent on promotion or reappointment.

For more information regarding leaves: Faculty Handbook, Section XVII ([http://www.yale.edu/provost/handbook/](http://www.yale.edu/provost/handbook/))
"Be thankful for what you have; you'll end up having more. If you concentrate on what you don't have, you will never, ever have enough."

-Oprah Winfrey