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

< back to search

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
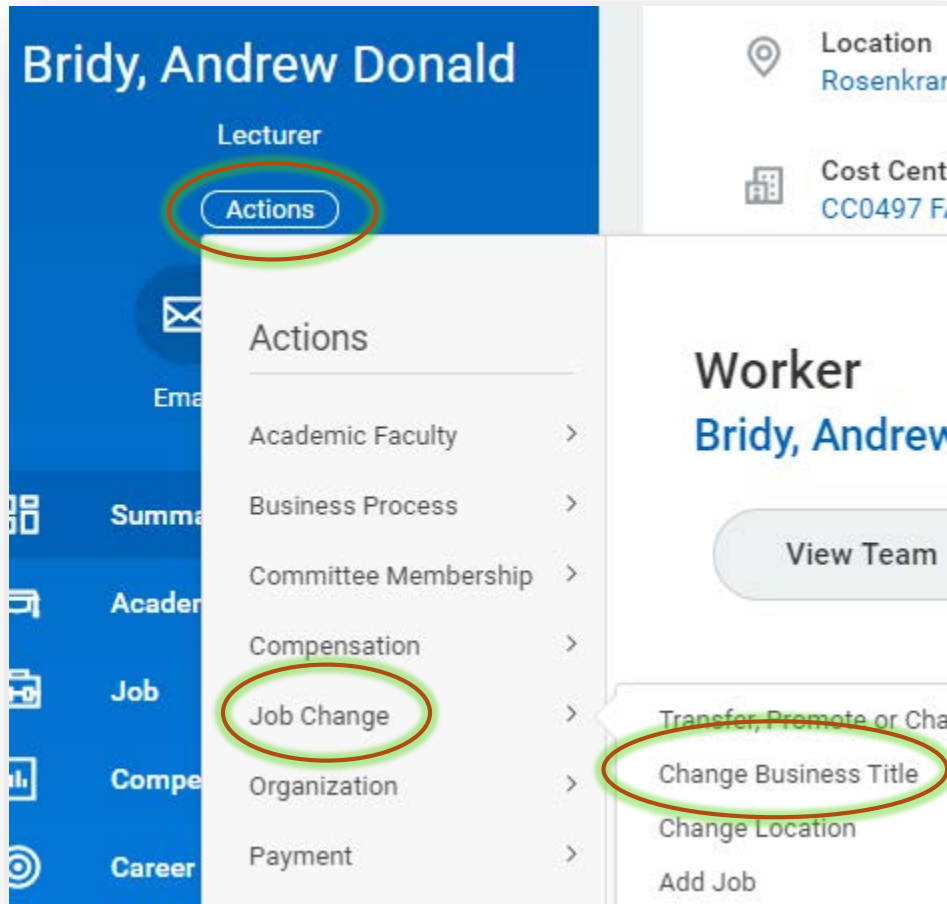
Updating faculty directory information

Supervisory org can update using Change Business Title business process

Reminders and Updates

Updating faculty directory information

Change Business Title
Bridy, Andrew Donald (Actions)
P278867 Lecturer - Bridy, Andrew Donald (Actions)

Effective Date * 07/01/2019 → Try to align with most recent change in appointment(s)

Job Profile Lecturer

Job Title Lecturer

Proposed   **Current**

Business Title * Lecturer of Political Science and of Cor   Business Title Lecturer

Supervisory org can update using Change Business Title business process

Reminders and Updates

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If known, add room #

MAILING ADDRESS:
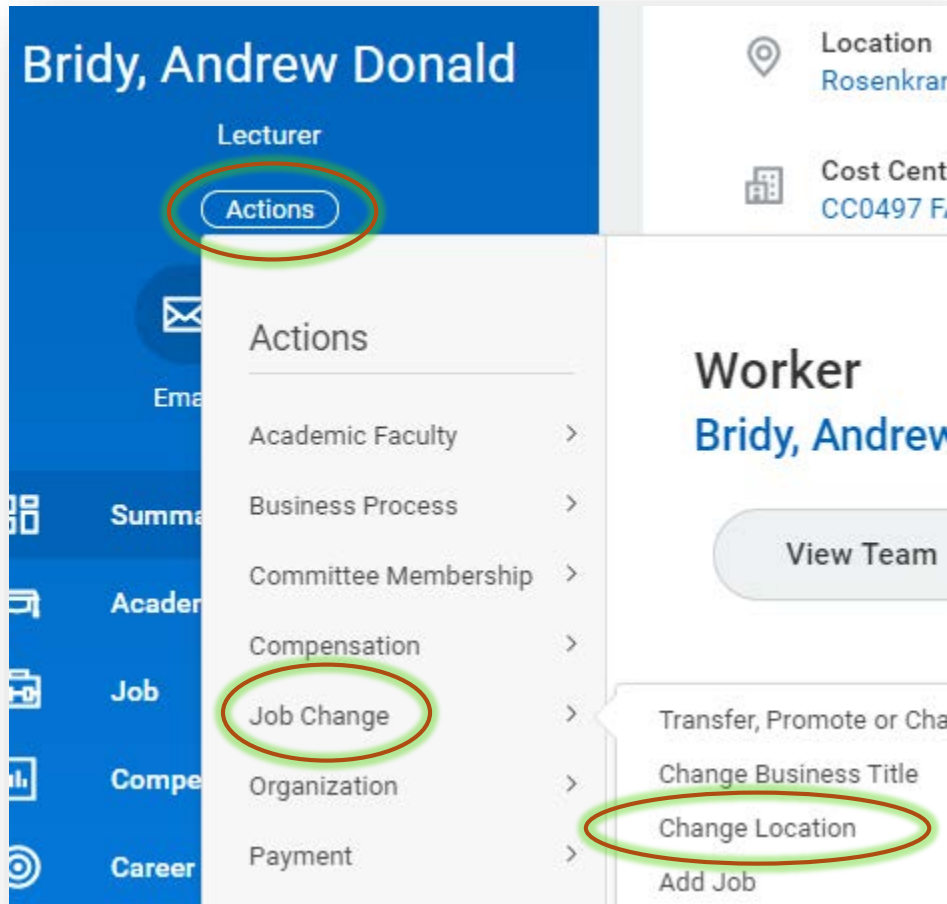
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Reminders and Updates

Updating faculty directory information

Supervisory org can update using Change Location business process

Reminders and Updates

Updating faculty directory information

When do you want this change to take effect? *

⚠️ 07 / 01 / 2019 📅

Alert:
This position has another event on the same date. Review the worker history to verify that other events on this date don't conflict with your changes. If the event details don't match, the worker or position can have unintended changes.

Why are you making this change? *

| search | ☰ |

✕ Change Location

Location Details

Location *

| ✕ Rosenkranz Hall ⋯ | ☰ |

Work Space

| search | ☰ |

✕ Rosenkranz Hall > 01 ⋯

Supervisory org can update using Change Location business process

Reminders and Updates

Updating faculty directory information

< back to search

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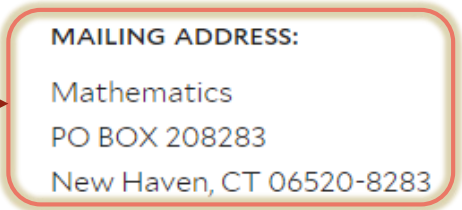
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New Haven, CT 06511

📍 Map It

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Rosenkranz Hall

Determined by Mail Code ⟶

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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:

▶ Interrolio 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.
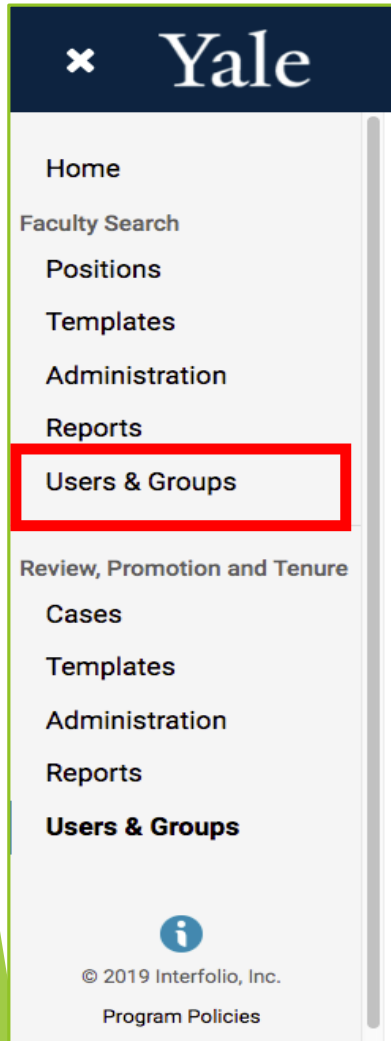
For Faculty Search:

▶ 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 part take 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

Add the role and save

Go back to edit the search, add manager

- ▶ On the OFAS website
- ▶ https://facultyadmin.yale.edu/searches-appointments/interfolio-introduction-and-tips/interfolio-managing-academic-job-postings/how

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

Adding members to a committee via the Case Details

Via the Case Details

Yale University > Cases >
Peter C. Tayel

Unit
Academic Unit (Test)

Template
School Nm - Initial Promotion to Tenure

Status
Select Sta

Case Materials   Case Details

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

⌄ **Committee Members (2)**   Email | Edit   Conve

No Comm

Name	Email	Role
Audrey Bribiescas	audrey.bribiescas@yale.edu	
Tracy Edwards	tracy.edwards@yale.edu	

Add C

Voting Results

Yale University > Cases >
Peter C. Tayel

Unit
Academic Unit (Test)

Template
School Nm

Case Materials   Case Details

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

Name	Email	Role	
Audrey Bribiescas	audrey.bribiescas@yale.edu	⊘ ☐ Manager	No
Tracy Edwards	tracy.edwards@yale.edu	⊘ ☐ Manager	
Pamela Bosward	pamela.bosward@yale.edu	✖	

Voting Results

> Unable to make a member a manager BUT you can recuse a member if needed

Back to the lists

- 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

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

Academic Leaves

Types and Eligibility

Most Common Academic Leaves

Leave Type	Eligible ranks	Notes
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.

Types and Eligibility

Less Common Academic Leaves - Paid

Leave Type	Eligible ranks	Notes
Sabbatical	Professors and Assoc Prof, tenured and adjunct	• One term or full year • Only one semester of pay • If full year, may supplement income with other employment
Special	Ladder faculty only	• One term or full year • Special circumstances only
Special Triennial	Professors and Assoc Prof, tenured only	• Full year • 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 • Special circumstances only

Types and Eligibility

Less Common Academic Leaves - Unpaid

Leave Type	Eligible ranks	Notes
Leave WO Salary	• Any ranks • Appointments > 3 years • At Yale > 1 year	Benefits premiums to be paid upon return, one month at a time
Leave WO Yale Salary	• Any ranks • Appointments > 3 years • At Yale	Receives pay through Yale by outside funding
Leave W Yale Salary	• Any ranks • Appointments > 3 years • At Yale	Receives pay from special funding within Yale

Teaching Relief and Work Reduction
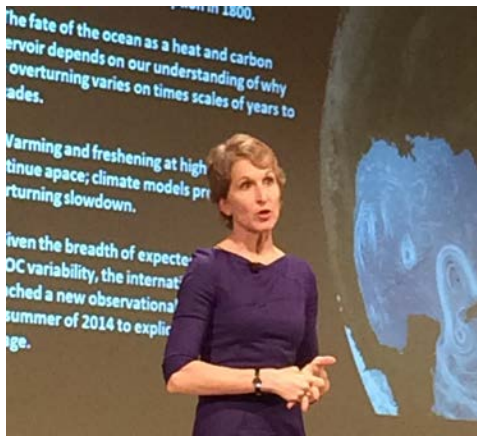
Academic Statuses

Teaching Relief and Work Reduction

Academic 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.
Secondment	Ladder and non-ladder instructional faculty	Mostly used for Yale-Nus and very special circumstances

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 <u>not</u> 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

Faculty leaves: Policies

Due to the complexities and many nuances associated with leaves, please <u>do not</u> inform faculty of their leave eligibility prior to confirming with your dean's office or my office.
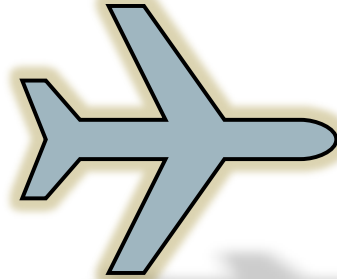
FACULTY LEAVES:

PROCEDURES AND TIMELINES

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

Department admins assist with gathering forms and sending to Diane Rodrigues

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

Procedures and Timelines

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.

Fall term   **Spring term**

| Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
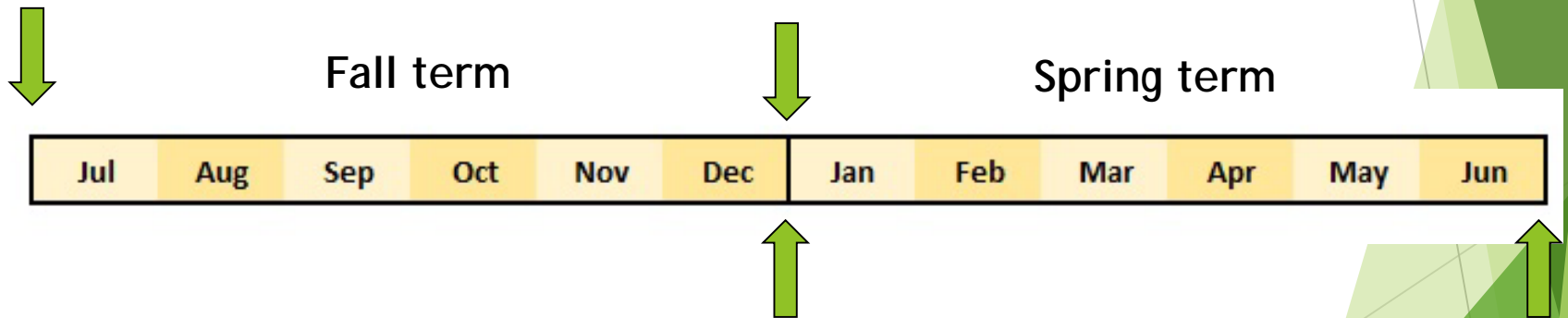
Procedures and Timeline

> ## 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/)

Procedures

Additional notes:

More information is on OFAS website
- *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/)

GIVE THANKS

FAMILY · FRIENDS · GRATITUDE

"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