Office of Faculty Administrative Services (OFAS)

Monthly Information Session

February 12, 2016
• Extra Compensation for Faculty (Abby Scott)

• Housekeeping

• Updated Charging Form

• Review of basic business process

• Updates to OFAS website
Extra compensation for extra work always requires Provostial pre-approval.

Salary supplements committed in an offer letter or retention agreement do not.
Is the payment extra pay for extra work or a salary supplement?

Extra Compensation
- Seek Provostial pre-approval using the new pre-approval form before the faculty member is approached.
- When time to pay,
  - Enter into Workday
  - Do not use the old extra comp form for payment processing.
  - Do use the OFAS charging instruction form and attach back-up, i.e., engagement document outlining terms, dates, rate of pay as well as the completed pre-approval form.

Salary Supplement
- Enter into Workday
- Complete the OFAS charging instruction form, attach appropriate back-up (e.g., copy of offer letter) and submit to faculty.admin@yale.edu
Faculty Pre-Approval Form

ROLES

Requester
- Requests approval before work is done
- Provides specifics about the activity/effort, dates, payment
- Obtains FRMS/OSP approval if grant-funded

Business administrator of paying department
- Confirms funding available
- Confirms faculty member will have active appointment at the proposed time of the work. *Extra comp cannot be paid if not.*

Request for Provostial Pre-Approval for Faculty Extra Compensation

I. Special Handling for Grant Payments

Will this be charged to a grant? [ ] YES [ ] NO

If yes, the services and scope of work for which compensation is being sought must be clearly detailed in the sponsored project proposal. Please obtain sign-off from the Office of Sponsored Projects (OSP) or Faculty Research Management Services (FRMS) before submitting to the Office of the Provost.

II. Exception Request for Extra Compensation

I certify that I am familiar with the requirements of this grant, that I have reviewed this extra compensation request and that this payment is clearly accounted in this sponsored project's proposal.

III. Office of the Provost Approval

I approve the funding of this request and confirm that the above information is correct.

Signature: __________________________ Date: __________________________

Please submit this form to provostforms@yale.edu in the Office of the Provost.
Housekeeping

• Deadlines to submit transactions for processing, this includes submission of supporting documents
  • FAS – 9th of every month
  • Professional schools – 15th of every month

• All compensation transactions require the Charging Instructions form
  • The form and charts are on OFAS website at
    http://facultyadmin.yale.edu/admin-processes

• Transactions in Workday that are more than 1 month old and missing supporting documents will be sent back.

• Workday training will begin again in March. An email announcement will be sent with the various options.
The Charging Instructions form is required for all transactions involving compensation, regardless of who will enter the charging into Oracle.

The form is available on the OFAS website at http://facultyadmin.yale.edu/admin-processes.
The list of reasons for the compensation have been increased to (a) include some that were missing and (b) add others that align with processes in Workday.

There is a great deal of confusion over the compensation amount, especially for secondary or additional compensation. Labels were changed in the Compensation section to clarify the intent.

A question was added to capture who will enter charging into Oracle to avoid any confusion.
Before starting any transaction, aim to have a complete understanding of the faculty member’s relationship with Yale.
• Gather all required documents for the transaction.
  • Refer to the relevant chart of required documents on the OFAS website.
  • The Charging Instructions form is required for all transactions involving compensation.

Example: New Hire = Offer Letter + CV + Charging
• Complete the latest version of the Charging Instructions form in its entirety.
  • Incomplete forms may lead to a delay in processing.
  • Validate the PTAEO.

• If the faculty member is not in your supervisory organization, you will need to send the documents to the supervisory org for processing.
  • Follow up with that org to be sure that the documents have been processed.
• Submit all supporting documents to faculty.admin@yale.edu as a complete packet.
• Use the following format for the subject line of your email message:
  • Faculty Member Last Name, First Name, Transaction Type, Effective Date (mm/dd/yy)
    • Example: Smith, John, Reappointment, 7/1/16
• This format will help OFAS staff track and locate each transaction.
• If submitting for multiple faculty in a single transaction, list the names of the faculty in the body of the email.
**Business Processes**

**View of Salesforce**

## Before formatting:

![Faculty Administrative Services](image)

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## After formatting:

![Faculty Administrative Services](image)

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Finally, and only after all documents are send to faculty.admin@yale.edu, enter the transaction into Workday.

Refer to the Administrative Processes page for tips on which process to use.
Updates to OFAS website

FAS documents are being moved to the FAS Dean’s Office website at http://fas.yale.edu/

Helpful charts and checklists will be added to provide guidance with Workday.
Open discussion

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