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

Non-Med School Faculty Extra Compensation

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 <u>before the faculty</u> <u>member is approached</u>.
- 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 <u>attach</u> <u>back-up</u>, 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 grantfunded

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 3501. FR. 08F Last modified 06-JAN-2016	Compensation
	Phone No.
Date of Request: School	pl/Dept
Faculty Name:Last name, First name	Employee #:
Faculty Rank:	School/Dept
Current and Active Workday Position:	School/Dept
	ber and description
Workday Supervisory Org:	
I. Special Handling for Grant Payments	
Will this be charged to a grant?	
If yes, the services and scope of work for which compensation is being sough project proposal. Please obtain sign-off from the Office of Sponsored Projects Services (FRMS) before submitting to the Office of the Provost.	
Grant Award Number and Name:	
OSP or FRMS Authorizer Name and Title:	
I certify that I am familiar with the requirements of this grant, that I have review this payment is clearly accounted in this sponsored project's proposal.	ed this extra compensation request and that
Authorizer Signature and Date:	
II. Exception Request for Extra Compensation	
Payment Amount Requested: \$ Start Date:	End Date:
Payment Amount Requested. \$ Start Date	End Date.
Description of Duties (scope of work, deliverables):	
Funding Source:	
I approve the funding of this request and confirm that the above information Business Administrator:	on is correct.
Name	Signature/Date
School/Department	_
Please submit this form to provostforms@yale.edu in the Office of the Provost	
III. Office of the Provost Approval	
Signature: Date: _	

Housekeeping

- Deadlines to submit transactions for processing, this *includes submission of supporting documents*
 - $FAS 9^{th}$ 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.

Updated Charging Form



- 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.

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FACULTY	INFORMATI	ION (SHO	ULD MATCH WORKDAY)							
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upervisory	Organizatio	n Name	(Primary Dept.):							
this facult	y member in	your su	pervisory organization?	Yes	No					
If not, this fo	orm will need	d to be aut	thorized by the paying department and	d sent to the facul	ty member's supe	rvisory orga	nization for entry in	nto		
	i this case ple is compensat		de enough information in the "Addition Vorkday	onal Information"	box below for the	em to be able	to enter the appro	priate		
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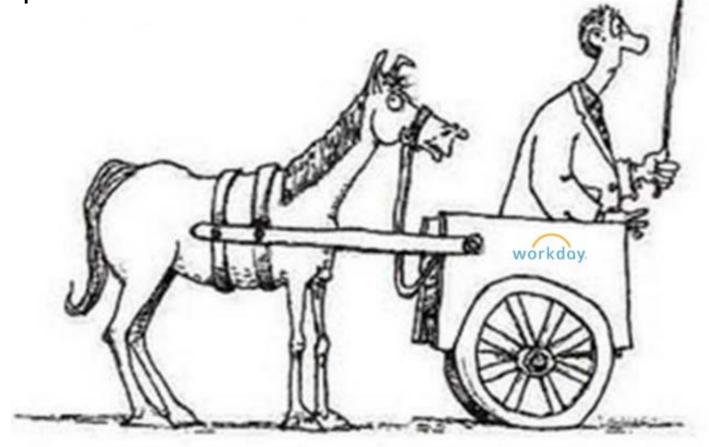
Updated Charging Form



- 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.

_									
37.		Note: Plea	ase download and save this form	•					
Ya	ie					actions involving	COMPI COMPENSATION	ENSATION	
Administ	rative Servic	es (OFAS)	s involving compensation, complete at faculty.admin@yale.edu. This for tructions from the Provost's Office i	rm is used to	obtain the				
	Note: If yours is not the supervisory organization for the faculty member use this form to provide compensation instructions to that organization.								
Prepared Dept:	Prepared by:								
<u> </u>	TV INFORM/	TION (SHO	OULD MATCH WORKDAY)						
Last Nam		trion (one	oco maron nombari	First Name					
Position/				Employee #				_	
		tion Name	(Primary Dept.):	Z.iipioyee i					
	-		pervisory organization?	Yes	No				
*If not, th	is form will no	eed to be au	thorized by the paying department and	sent to the fac	ulty memb				
	In this case p this compens		de enough information in the "Addition Workday	nal Informatio	n" box belo	w for them to be abl	e to enter the approp	rlate	
	of Non-sup			Date		Name:			
2. COMPE	ENSATION IN	FORMATIO	ON (for this transaction only)	Date					
Reason:					-	FTE % time (=sche	eduled hrs/40):		
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Additiona	al information								
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			ring the charging into Oracle:					-	
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Final Aut	horization(s):								
FAS Dear				Provost's C	Office				
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Office of F	aculty Admini	strative Ser	vices use only						
Notes:									
Reviewed				Approved in W			P-1-		
	Na	ime	Date		N.	ame	Date		
Verify and Print Form									
2/10/2016 Submit completed forms, or ask ouestions, by emailing faculty.admin@vale.edu									

Before starting any transaction, aim to have a complete understanding of the faculty member's relationship with Yale.

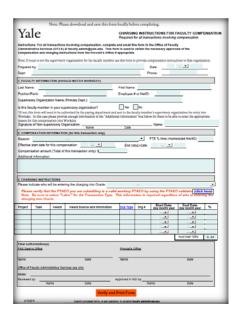


- Gather all required documents for the transaction.
 - Refer to the relevant chart of required documents on the OFAS website.
 - The Charging Instructions form is required for <u>all</u> transactions involving compensation.

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 <u>faculty.admin@yale.edu</u> 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.

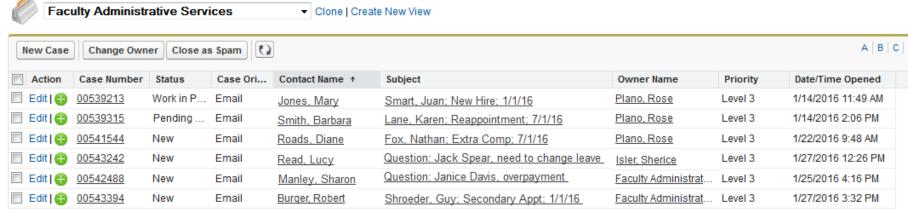


View of Salesforce

Before formatting:



After formatting:



- Finally, and only after all documents are send to <u>faculty.admin@yale.edu</u>, enter the transaction into Workday.
 - Refer to the Administrative Processes page for tips on which process to use.

*Forms replaced by a Workday business process. Refer to the section below for a link to the guide.

*Faculty Appointment Form (3501 FR.56)

Uses and corresponding Workday guide for the new process:

(1) Recording a promotion for a faculty member. Change Job: In Track Promotion (Academic)
(2) Re-appointing a faculty member to a primary, fully joint, or secondary appointment. Academic:

Managing Appointments
(3) Providing a faculty member with an initial secondary appointment. Academic: Managing
Appointments

Back to list

*Faculty Data Change Form (3501 FR.08G)

Uses: This form was used for making changes to appointment or compensation information that was previously submitted on another form. In Workday, you may often use the "Correct" option to make a change to a previously approved business process.

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.



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