

# Office of Faculty Administrative Services

## Monthly Information Session

February 13, 2020

# Agenda

## Reminders and Updates

- Warning about Adobe Document Cloud
  - Training
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## New Academic Appointee Administration (AAA) website

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## Academic Leaves

- Completing the process and ad hoc changes
- 

## Academic appointee data clean-up in Workday

- End dating compensation
  - Academic titles
-

# Reminders and Updates

Reminder...

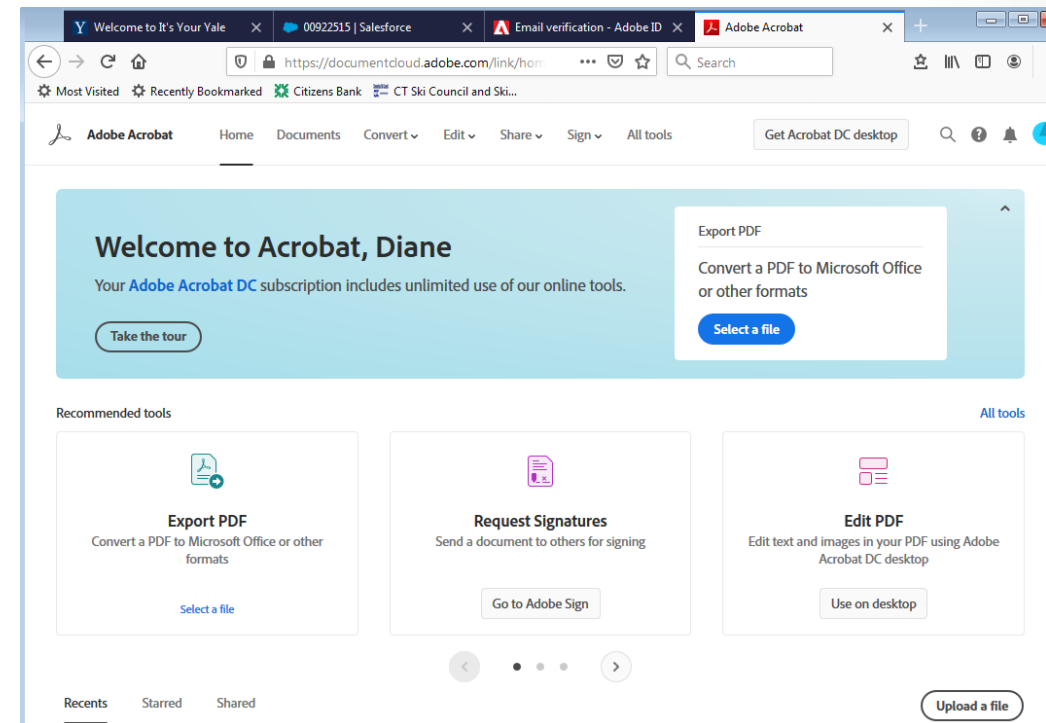
**Your attitude not your aptitude  
will determine your altitude.**

**- Zig Ziglar**

# Update

## *Adobe Document Cloud*

- ❖ Provides area for storing documents in the 'cloud'
- ❖ Intended for use with Low Risk data
- ❖ Should not be used with Medium or High-Risk data, such as offer letters or confidential letters of recommendation



# Update

## Training

- ❖ New videos being created (<https://workday.training.yale.edu/>)
  - *Navigating Workday for Academics*
  - *Understanding Faculty Appointments at Yale*
  - *Promotions in Track*
- ❖ Live training
  - *Understanding Faculty Appointments at Yale – To be scheduled soon*

The screenshot shows the 'Workday@Yale Training' website. The navigation bar includes 'Home', 'Training', 'Support', 'News', 'Reporting Updates', and 'Login to Workday'. The breadcrumb trail is 'HOME > PEOPLE ADMINISTRATION (HCM)'. The main heading is 'People Administration (HCM)'. Below the heading, there is a paragraph: 'The following training materials are for Workday tasks that managers and business offices complete on behalf of Yale staff and faculty.' A table lists training materials with columns for 'TITLE' and 'TYPE'.

TITLE	TYPE
<a href="#">Academic Appointee Transactions Quick Tips</a>	Support Documentation
<a href="#">Academic Course and Committee Information</a>	Training Guide
<a href="#">Academic Reason Codes</a>	Support Documentation
<a href="#">Academic: Add Employee Status to Academic Affiliate</a>	Training Guide

**New Academic Appointee  
Administration (AAA) website**

# New Academic Appointee Administration (AAA) website

Linked from <https://your.yale.edu/>

It's Your Yale

CALENDARS · WORKDAY · NEWS · DIRECTORIES · MEDIA · LOGIN

SEARCH

Work at Yale Technology at Yale Policies & Procedures Research Support Community

Thanks to You

Watch Workplace Survey video: next steps

YALE LINKS	CAREERS
MYTIME	SUPPORT
LEARN AND GROW	WORKDAY
	SHARE YOUR STORY

It's Your Yale

CALENDARS · WORKDAY

Work at Yale Technology at Yale Policies & Procedures

## Support

- Employee Services
- ITS Help Desk
- Finance Support Center
- Academic Appointee Administration (AAA) Support



# New Academic Appointee Administration (AAA) website

It's Your Yale

CALENDARS WORK

Work at Yale Technology at Yale Policies & Procedures



## Academic Appointee Administration (AAA) Support

For policies, training documents, and forms that support the academic appointee career path at Yale.

### Tools

- [Log into Workday](#)
- [Interfolio](#)
- [Academic Appointee Calendar](#)

### Offices

- [Office of Faculty Administrative Services](#)
- [Office for Postdoctoral Affairs](#)
- [Faculty of Arts and Sciences Dean's Office](#)
- [Yale School of Medicine \(YSM\) Faculty Affairs](#)
- [YSM Dean's Office HR](#)

### Additional Resources

- [Workday Training](#)
- [Interfolio – Introduction and Tips](#)
- [Faculty Handbook](#)
- [Office of Institutional Equity and Access](#)
- [University Policies, Procedures, Forms, and Guides](#)
- [Office of International Students & Scholars](#)

# Academic Leaves

Completing the process  
and ad hoc changes

# Academic Leaves – Completing the process

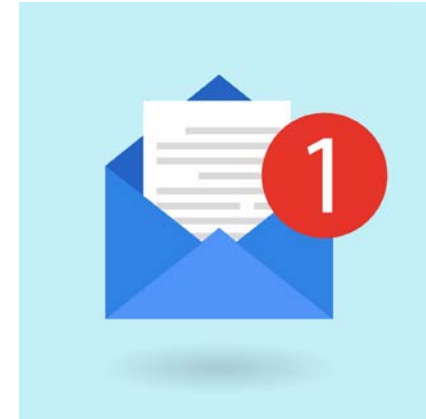
## *Upon receipt of approval*

### ❖ Professional Schools

- ❖ Communicate approvals to faculty
- ❖ cc: [diane.Rodrigues@yale.edu](mailto:diane.Rodrigues@yale.edu)

### ❖ FAS departments

- ❖ No need to send copies of approval memos to Diane or to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)



# Academic Leaves – Completing the process

## *Upon receipt of approval*

- ❖ Enter approved leaves in Workday
  - ❖ Workday training guide, *Leave of Absence: Absence/Relief Time – Academic (Time Off)* online at <https://workday.training.yale.edu/>
  - ❖ Reminder: All academic leaves *begin on either July 1 or January 1* and *must end on either June 30 or December 31*.

Leave period	Dates to enter in Workday
Fall 2020	First Day of Leave = 07/01/2020, Estimated Last Day = 12/31/2020
Spring 2021	First Day of Leave = 01/01/2021, Estimated Last Day = 06/30/2021
Academic year 2020-2021	First Day of Leave = 07/01/2020, Estimated Last Day = 06/30/2021
Calendar year 2021	First Day of Leave = 01/01/2021, Estimated Last Day = 12/31/2021

# Academic Leaves – Completing the process

*Upon receipt of approval*

- ❖ Enter approved leaves in Workday
- ❖ Use the 'Leave Type' approved in the memo
- ❖ Reminder: Phased Retirement, Short-Term Medical Disability, Teaching Relief for Child Rearing, and Teaching Relief for Learning are Academic Statuses

The image shows a sequence of three screenshots from the Workday system, illustrating the navigation path for entering academic leaves. The first screenshot shows a menu with 'Academic' highlighted in a red box. A red arrow points from this box to the second screenshot, which shows the 'Academic' menu expanded to 'Academic Status', with 'Academic Status' highlighted in a purple box. A purple arrow points from this box to the third screenshot, which shows the 'Academic Status' menu expanded to 'Academic Status > Faculty Short-Term Medical Disability', which is selected. The third screenshot also lists other options like 'Phased Retirement Work Reduction', 'Secondment', 'Teaching Relief Child Rearing', and 'Teaching Relief for Learning'.

Academic

- Academic Status
- Administrative
- Medical
- Non-Medical

search

Academic

- Academic > Associate Professor Leave
- Academic > Faculty Sabbatical - Up to 12 Month
- Academic > Faculty Sabbatical - Up to 6 Month
- Academic > Faculty Special
- Academic > Faculty Special Triennial
- Academic > Faculty Triennial
- Academic > Leave WO Salary

search

Academic Status

- Academic Status > Faculty Short-Term Medical Disability
- Academic Status > Phased Retirement Work Reduction
- Academic Status > Secondment
- Academic Status > Teaching Relief Child Rearing
- Academic Status > Teaching Relief for Learning

search

# Academic Leaves – Completing the process

*Verify that all leaves are entered*

- ❖ Run Workday report, *Academic - Employees on Leave, by Academic Unit - Yale*
- ❖ Recommendation: Run this report prior to doing any data entry to avoid duplication

Enter the chair's or school dean's highest org

The screenshot shows the configuration interface for the report 'Academic - Employees on Leave, by Academic Unit - Yale'. The interface includes a header, instructions, and various filter fields. The 'Organizations' field is highlighted with a red asterisk and a purple arrow pointing to a text box. The 'On Leave Between' and 'And' date fields are also highlighted with blue boxes.

**Academic - Employees on Leave, by Academic Unit - Yale**

Instructions: This report includes Leave Requests that have been approved and those that are pending (if "Include Leave Requests Pending Approval" is checked). Prompts include: Academic Structure Node (for the primary appointment), Academic Unit (for the primary appointment), Organization (including subordinates), Employee Type (defaulted to Faculty and Other Academic), and Appointee.

Employee Type:  Faculty  Other Academic

Academic Structure Node (Primary Appt):

Academic Unit (Primary Appt):

Track Type Category (Primary Appt):

Appt Type (Primary Appt):

Organizations:  Ecology and Evolutionary Biology - Office of the Chair (Near, Thomas J)

Include Subordinate Organizations:

Appointee:

Leave Type (Including Family):

Leave Request Status:

Include Leave Requests Pending Approval:

On Leave Between: 09 / 01 / 2020

And: 05 / 31 / 2021

# Academic Leaves – Ad hoc changes

*Throughout the year...*

- ❖ Requests for leaves and relief time may be submitted throughout the year using the form, Request for Faculty Leave or Teaching Relief
  - ❖ (Linked from <https://facultyadmin.yale.edu/academic-career-events/leaves-teaching-relief> )
- ❖ Cancellations – send email to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)
- ❖ Changes – faculty member must submit a new form

Direct questions to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)

# Academic appointee data clean-up in Workday



# Academic appointee data clean-up in Workday

## *OFAS to enter:*

- ✓ Adding end dates to compensation
- ✓ Updating academic appointment title

## *OFAS to work with departments:*

- ✓ Ending expired secondary appointments
- ✓ Ending expired Academic Affiliate appointments
- ✓ Ending contracts for expired Contingent Workers

# Academic appointee data clean-up in Workday

*OFAS to enter:*

- ✓ Adding end dates to compensation
- ❖ Adding the end date causes the salary to drop
- ❖ Faculty with appointments less than a full year must have end dates
- ❖ If benefit eligible, benefits will be cancelled and the faculty member will be sent a COBRA letter
- ❖ If reappointed with compensation, you will need to re-add the Academic Salary plan

Plan Assignments 1 item

Effective Date	Plan Type	Compensation Plan	Assignment	End Date
08/01/2016	Salary	<a href="#">Academic Salary</a>	240,000.00 USD Annual (Prorated: 120,000.00)	05/31/2020

# Academic appointee data clean-up in Workday

*OFAS to enter:*

- ✓ Updating academic appointment title
- ❖ Automated process created and inserted academic title on Primary appointment
  - ❖ If Fully Joint, added to appointment with Position #
- ❖ Process did not run for certain faculty
  - ❖ These will be identified, then uploaded in a batch process

Reason	Update Academic Appointment > Change of Appointment Details > Appointment Title Update
Rank	Professor
Appointment Specialty	(empty)
Constructed Title	Professor
Title	Professor of Religious Studies and of American Studies and of History

Thank you!  
Make it a wonderful day for  
yourself and someone else.