

# Office of Faculty Administrative Services (OFAS)

## Monthly Information Session

March 11, 2016

- **Housekeeping**
- **Updates to Workday**
- **Review of last month's key points**
- **OFAS Training Plan - Spring 2016**
- **Maintaining and Updating Faculty Records**
  - **Reports to run**
  - **Actions to be taken**

**Courteous Colleagues** - During this session, please refrain from having conversations among you. If you have questions or comments, please raise them to the group. Sharing information is a great benefit of these sessions.



**Deadlines** to submit transactions for processing, this *includes submission of supporting documents*

- **FAS – 9<sup>th</sup> of every month**
- **Professional schools – 15<sup>th</sup> of every month**



All presentations from these sessions are available on <https://classesv2.yale.edu/portal> . This spring, we will begin posting these on the OFAS website.



## New Workday Functionality Beginning Week of March 13<sup>th</sup>

*While the new functionality is being implemented and tested Saturday, March 12 through Sunday, March 13, there will be limited access to Workday. We plan to have Workday up and running again by Monday, March 14<sup>th</sup> at 7:00am.*

- **Extra compensation** must be accompanied by Provostial Pre-Approval (new form: [3501 FR.08 H Provostial Pre-Approval for Faculty Extra Compensation](#)).
- **All compensation transactions** require the form [Charging Instructions for Faculty Compensation](#).
  - **Secondary units** must send the form the supervisory organization for entry into Workday.
  - The PTAE(s) must be included regardless of who is entering into Oracle.
- When submitting documentation to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) use the following format for the subject line:
  - **Last name** of faculty member, **First name** of faculty member, **Transaction Type**, **Effective Date**

- Monthly Information Sessions – 2<sup>nd</sup> Friday monthly
- Workday
  - Group training on specific topics\*
  - Business Partner training\*
  - Weekly workshops for small groups\*
- Orientation for new hires into faculty admin support roles offered in the Yale Summer Training Program for Admins

\* *Register for these sessions in TMS*

([https://bmsweb.med.yale.edu/tms/tms\\_enrollments.courses](https://bmsweb.med.yale.edu/tms/tms_enrollments.courses))

To register for courses, you may go to the OFAS site, click on the Calendar link on the top menu bar, then, click on any course title.

The screenshot shows the 'Faculty Administrative Services' website. At the top right, there is a link for 'Office'. Below this is a dark green navigation bar with links for 'Home', 'Searches', 'Reappointments & Promotions', 'Leaves', 'Resources', and 'Calendar'. The 'Calendar' link is circled in red. An orange arrow points from the 'Calendar' link to the 'Calendar' link. Below the navigation bar, the breadcrumb 'Home » Calendar' is visible. There are five view options: 'Upcoming' (highlighted), 'Month', 'Week', 'Day', and 'Year'. The main content area is titled 'Upcoming Events'. It lists three events: 'March 11, 2016' with the title 'Monthly Information Session - March 11th'; 'March 16, 2016' with the title 'OFAS Training - Workday Basics: Faculty and Other Academics' (circled in red); and 'March 21, 2016' with the title 'OFAS Training - Workday: Business Partner Review Process'. An orange arrow points from the text on the left to the 'OFAS Training - Workday Basics' event title.

The course descriptions contain a link to TMS.

Home » Calendar » OFAS Training - Workday Basics: Faculty and Other Academics

## OFAS Training - Workday Basics: Faculty and Other Academics

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**Event time:**  
Wednesday, March 16, 2016 - 9:00am

**Location:**  
Training room LL 2/3  
221 Whitney Avenue  
New Haven, CT 06520

**Event description:**  
**Audience:** This 90-minute session is for Central Campus (non-YSM departments) administrators who currently hold any of the following roles in Workday: Academic HR Support Specialist, Appointments and Promotions Specialist, Business Partner, Academic Business Partner.

The purpose of this session is to review basic concepts in Workday related to academic appointees such as tracks, ranks, employee vs contingent worker vs academic affiliates, as well as review Workday business processes which involve hiring faculty, re-appointments, compensation, and other related scenarios. The hiring process will be covered in great depth.

**Register** for the desired session [in TMS](#). Be sure to click on the course title to see the full list of dates and times.



In TMS, click on the course title to view the course description and additional dates and times.

Yale University

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## Training and Certification

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Courses by Owner > Office of Faculty Administrative Services > Faculty Administration

### Courses for Category Faculty Administration

#### Office of Faculty Administrative Services

#### Faculty Administration

Course/Form Title	Next Class	Start Time	Seats Available
<a href="#">Interfolio Promotion &amp; Tenure</a>	Contact course owner	N/A	N/A
<a href="#">Workday Basics: Faculty and Other Academics</a>	Wednesday, March 16th 2016	09:00 AM	25

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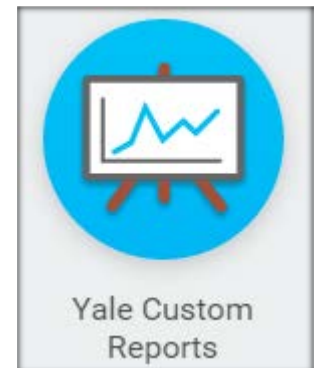
March is a good month to run faculty reports to review for accuracy, identify records for update, and begin taking the necessary actions.

## Recommended Academic Reports

Academic - Expiring Appointments - Yale

Academic - Informational Extract with Primary Appointment – Yale – also known as the “kitchen sink” report

Academic - View Current Appointments – Yale, or just review the list of appointments for the Academic Unit



## Recommended approach for reviewing records:

- 1) Run the report with the intention of pulling the largest set of results.
  - a) Use very few filters.
  - b) Use a very wide date range, e.g. 3/1/15 to 6/30/16
- 2) Export the results to Excel. This will allow you to use functionality that will make proofing easier, such as filtering, sorting, and highlighting.
- 3) Key items to identify are as follows:
  - a) Terminated faculty with active appointments that need to be ended.
  - b) Faculty with expiring appointments who need to be reappointed or terminated.

Run the report with the intention of pulling the largest set of results.

- a) Use very few filters.
- b) Use a very wide date range, e.g. 3/1/15 to 6/30/16

Academic - Expiring Appointments - Yale

Instructions View Academic Appointments expiring within a given date range [ Default: to Displays Academic Unit, Appointee, Tenure Status, Track, and Rank. Report in Sorted by Academic Unit, Track Type, Rank, then Academic Appointee.

Academic Structure Node

Academic Unit

Academic Track Type Category

Academic Rank

Appointment Type

Appointment Expires On or After \* 03 / 10 / 2015

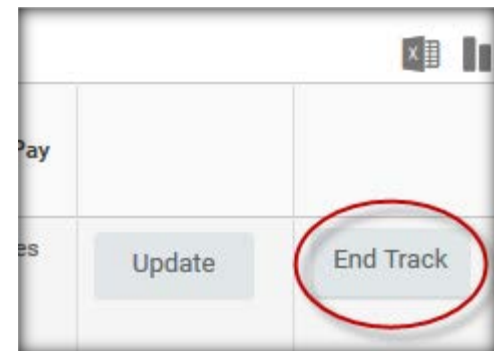
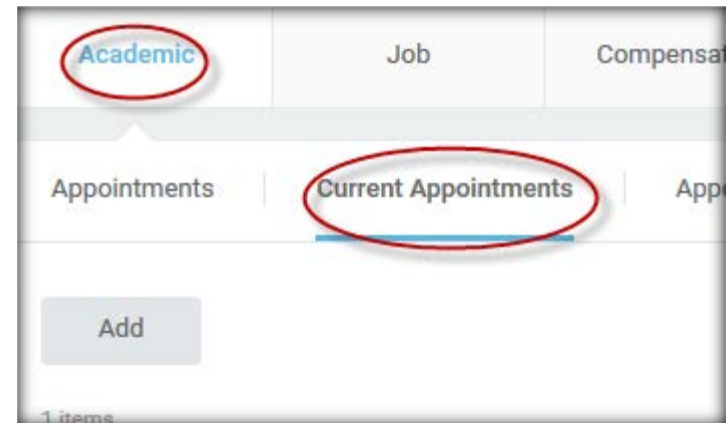
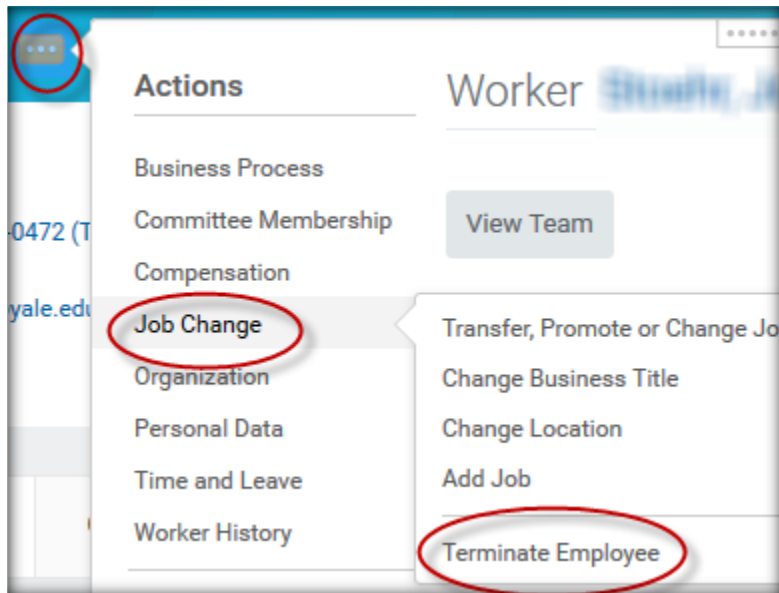
Appointment Expires On or Before \* 06 / 30 / 2016

The **Academic - Expiring Appointments – Yale** report will indicate if the faculty member has a future appointment. When these results are exported to Excel, the checkmark is converted to either a “1” (non-ladder faculty) or “2” for ladder faculty.

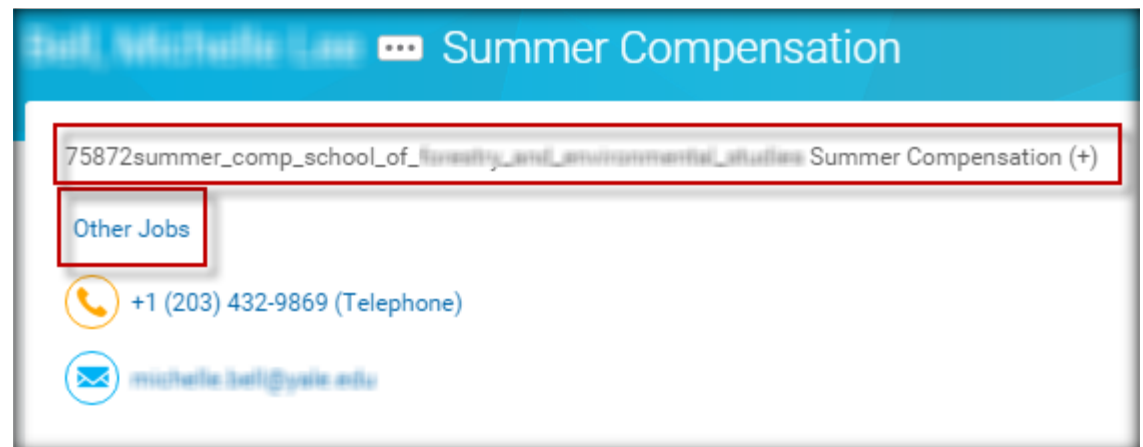
Academic Unit	Appointee	Re-appointment(s) Exist?	Status	To Appt Record	Appointment Type	Track Type Category	Track Type	Academic Rank
Yale University	John Doe		Active	Q	Primary	Non Ladder - Teaching	Teaching	Lecturer
Yale University	Jane Smith		Active	Q	Primary	Ladder	Ladder	Assistant Professor
Yale University	John Doe	✓	Active	Q	Primary	Ladder	Ladder	Assistant Professor
Yale University	Jane Smith		Active	Q	Secondary	Ladder	Ladder	Assistant Professor
Yale University	John Doe			Q	Secondary	Ladder	Ladder	Assistant Professor
Yale University	Jane Smith		Active	Q	Secondary	Ladder	Ladder	Professor
Yale University	John Doe		Active	Q	Secondary	Ladder	Ladder	Professor

- All active faculty should have academic appointments. Add the appointment if missing.
- Faculty should be terminated if there is no plan to rehire in the next year.
- Any faculty member who is currently receiving benefits from Yale and needs to transition to COBRA when his or her appointment ends will need to be terminated.

- When terminating faculty, it is important to begin with the Terminate employee task, then End the academic appointment.



- Any faculty member who resigns prior to the scheduled term end date must submit a letter of resignation. A copy must be submitted to OFAS.
- Faculty who received summer compensation or taught in the Summer Session will have “Other Jobs”. These need to be ended before the faculty member can be terminated.
  - If the job was in another department, it will not be visible to you. Email [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) for assistance.





- **Retirements**
  - **Emeritus faculty remain active.**
    - If they plan to work after retirement, they should be hired into a new job with a relevant job profile, but the Emeritus appointment on the academic side must remain as their primary appointment.
  - **Regular faculty need to be terminated to receive retiree benefits.**
    - If they plan to work after retirement, they are hired into the new job as if being rehired. The term “Retired-Active” will appear after the name in Workday.

(Retired - Active)

- Questions?
- Topics for future sessions
- Questions, feedback, or suggestions for future meeting topics are always welcome
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  - x6-1697