Office of Faculty Administrative Services (OFAS)

Monthly Information Session

March 11, 2016
Agenda

• 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 – 9th of every month
  • Professional schools – 15th of every month

All presentations from these sessions are available on https://classessv2.yale.edu/portal. This spring, we will begin posting these on the OFAS website.
New Workday Functionality
Beginning Week of March 13th

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 14th at 7:00am.
Review of last month’s key points

- **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 PTAE0(s) must be included regardless of who is entering into Oracle.

- When submitting documentation to 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**
OFAS Training Plan – Spring 2016

• Monthly Information Sessions – 2nd 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)
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 course descriptions contain a link to TMS.
In TMS, click on the course title to view the course description and additional dates and times.
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
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.

<table>
<thead>
<tr>
<th>Academic Unit</th>
<th>Appointee</th>
<th>Re-appointment(s) Exist?</th>
<th>Status</th>
<th>To Appt Record</th>
<th>Appointment Type</th>
<th>Track Type Category</th>
<th>Track Type</th>
<th>Academic Rank</th>
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<td>Active</td>
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<td>Active</td>
<td>Primary</td>
<td>Non-Ladder - Teaching</td>
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• 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 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.
• Questions?

• Topics for future sessions

• Questions, feedback, or suggestions for future meeting topics are always welcome
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