

Office of Faculty Administrative Services (OFAS)

Information Session

March 17, 2017



- **Housekeeping**
- **Minors in Lab and Visiting Students in Research (VSIRs)**
- **Workday updates – release 28**
- **Workday reports to be run**
- **Merit process**
- **OISS memo re. visas**
- **Topics for next session**

Deadlines to submit transactions ***through May***:



- **FAS – 9th of every month**
- **Professional schools – 15th of every month**

Deadline to submit transactions with *effective dates in June through September* is **one month in advance of the effective date.**

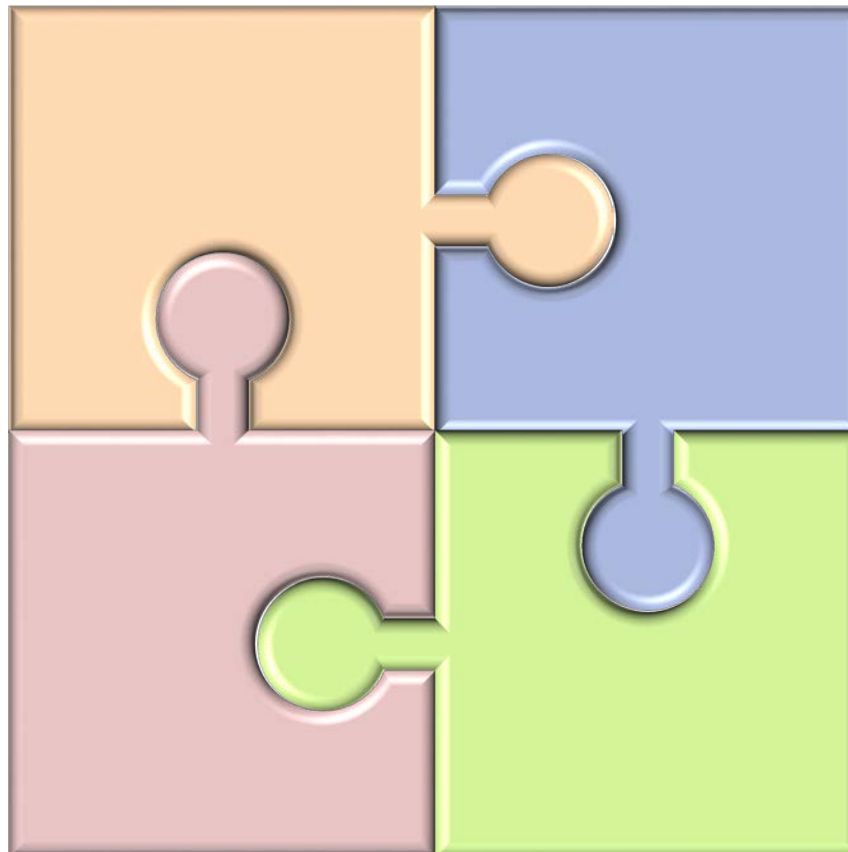
- **All transactions involving **compensation** require a ***Charging Instructions*** form.**
- **All transactions involving **compensation or appointments** require **supporting documentation.****

OFAS Administrative Procedures Model

External Processes –

Obtaining approval, Search, Promotion Review, Hire, Send offer letter, etc.

Submit all documentation to faculty.admin@yale.edu and receive ticket number for tracking.



Documentation –
Charging
Instructions (if compensation),
Signed Offer Letter,
recommendation
letters, CV, etc.

Submit transaction
in **Workday**.

Memo from Environmental Health & Safety ([EHS](#)) sent on 2/28/17 to PIs, Clinic Managers, and Contacts:

- **Minors in the Lab and Visiting Students in Research** are no longer entered in Workday. To obtain NetID, create as Sponsored Identities.
- New online system, *EHS Integrator*, replaced paper application process:
<https://ehsis.yale.edu/EHSIntegrator/Registration>
 - Streamlines entire process
 - Integrates EHS, IACUC, HIPAA, and HRPP approvals into one system
 - Allows submission of multiple minors or visiting students on one form



New Workday functionality was rolled out on March 13

The following are some of the highlights

For the full list of changes, go to <https://workday.yale.edu/news/march-workday-functionality-updates>

Universal Initiation of Request One-time Payment by Paying Unit

- Paying unit can now initiate Request One-Time Payment for faculty outside of dept/unit.
- Payment will route to Business Partner of the primary supervisory organization of the faculty member, then OFAS.
- All external procedures remain the same, i.e.
 - Submit a [Provostial Pre-approval](#) form to the Provost's Office to request permission to pay a one-time payment.
 - Submit Charging form and supporting documentation to (1) the Business Partner of the primary supervisory organization of the faculty member and (2) to OFAS.
- For instructions on how to enter into Workday, refer to guide, [Manage Compensation \(Academic\)](#)

Updated Related Actions Header Icon

- The related actions icon that appears in the header on Workday screens is changing to an actions icon:
- The related actions icon will remain unchanged anywhere else it appears on the screen.

Former:

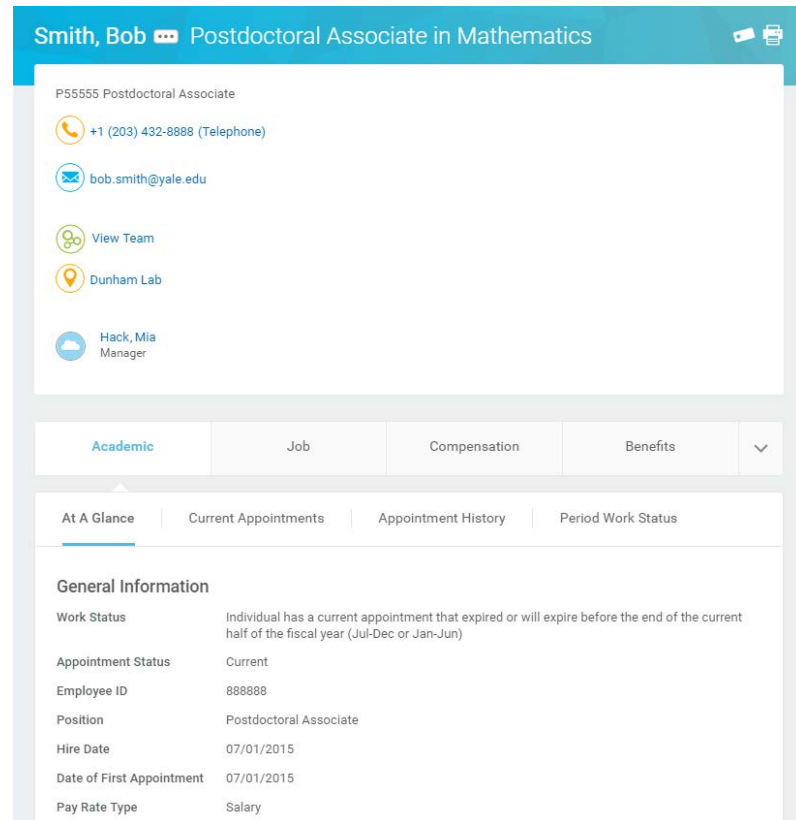


New:



Unified User Profile

- The user profile as it appears on a desktop will more closely match the mobile experience.



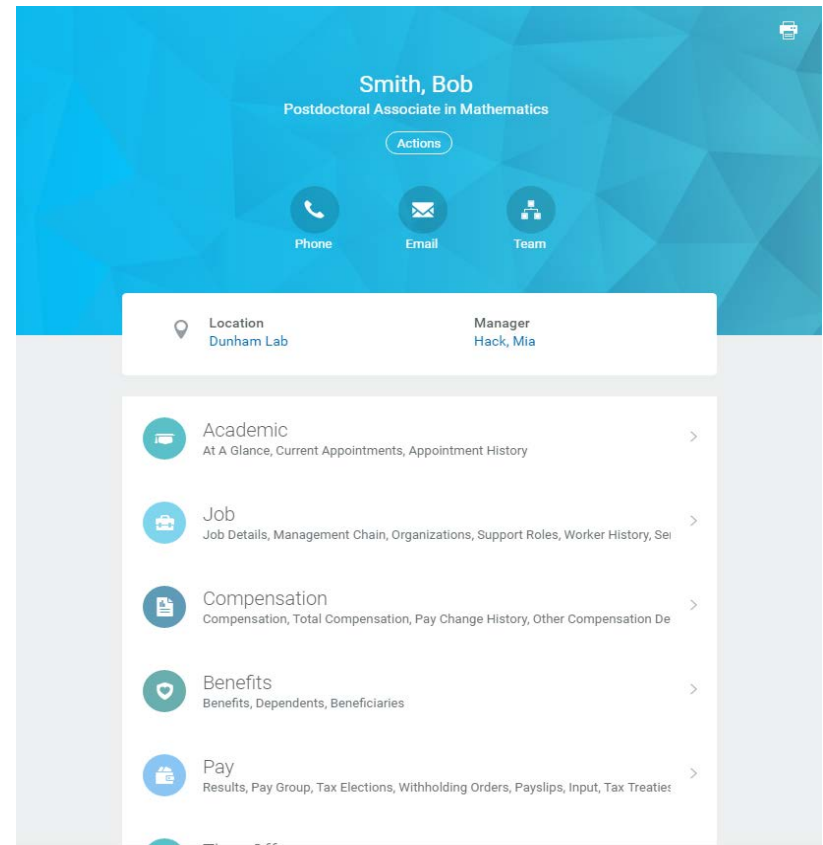
Former look had horizontal tabs

Unified User Profile

- The user profile as it appears on a desktop will more closely match the mobile experience.

New profile has vertical list of options

Tip: Right click on a link and select “See in New Tab” to preserve original results

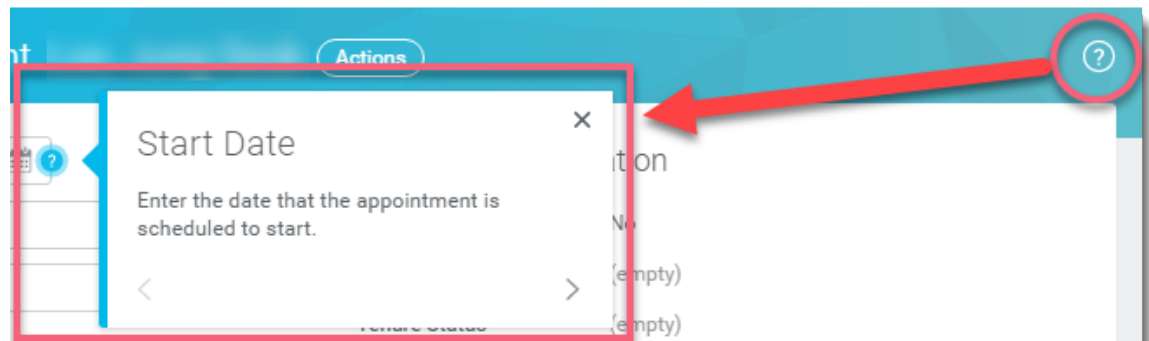


Education (Degree Data)

- To ensure that education information (degree data) is properly maintained in Workday, the hire process now has a To Do reminding you to enter this information.

Field-specific Help Text

- Addition of field-specific help text on the Add and Update Academic Appointment business processes



Please run the following list of Workday reports and take the actions requested by March 31:

- *Academic - Employees on Leave by Academic Unit – Yale*
- *Academic QA - Missing Degrees – Yale*
- *Academic QA - Expired Current Appointments – Yale*

Academic - Employees on Leave by Academic Unit – Yale

- Run for the highest supervisory org to which you have access. This is either your school dean or department chair.
- Enter dates of *On Leave Between 7/1/17 And 6/30/18*.
- Verify the list of faculty on leave.
- Refer to the Workday guide, [Leave of Absence: Absence/Relief Time – Academic \(Time Off\)](#), if you need to return faculty from a leave or place them on leave.

Note: If you need to place them on leave, verify that you have submitted the necessary supporting documents to OFAS.

Example of prompts

Academic - Employees on Leave, by Academic Unit - Yale

Instructions This report includes Leave Requests that have been approved and those that are pending (if "In appointment), Academic Unit (for the primary appointment), Organization (including subordina

Employee Type	<input checked="" type="checkbox"/> Faculty	⋮
	<input checked="" type="checkbox"/> Other Academic	⋮
Academic Structure Node (Primary Appt)		⋮
Academic Unit (Primary Appt)		⋮
Track Type Category (Primary Appt)		⋮
Appt Type (Primary Appt)		⋮
Organizations	* <input checked="" type="checkbox"/> English - Office of the Chair (Hammer, Langdon L)	⋮
Include Subordinate Organizations	<input checked="" type="checkbox"/>	
Appointee		⋮
Leave Type (Including Family)		⋮
Leave Request Status		⋮
Include Leave Requests Pending Approval	<input checked="" type="checkbox"/>	
On Leave Between	07 / 01 / 2017	📅
And	06 / 30 / 2018	📅

Academic QA - Missing Degrees - Yale

- This report checks for faculty who are missing degree information. Degree information is incredibly important for a variety reasons and is crucial for institutional reporting, such as U.S. News and World Report and for the accreditation process.
- Recommended order of run:
 - Run ladder faculty (*Track Type Category* = **Ladder**)
 - Run for teaching faculty (*TTC* = **Non-ladder Teaching and Professional Practice**)
 - Run for research faculty and postdocs (*TTC* = **Research and Training**)

Refer to Appendix for instructions on adding degree information.

Example of prompts

Academic QA - Missing Degrees - Yale

Instructions This report lists faculty and selected contingent workers whose degree information is mis

Organization (incl subordinates)

Academic Unit (Primary Appt)

Track Type Category (Primary Appt)

Academic Rank (Primary Appt)

Tenure Status (Primary Appt)

Worker

Only Include Tenured?

Only Include Active Workers?

Filter Name

Manage Filters

0 Saved Filters

Academic QA - Expired Current Appointments – Yale

- All faculty who are not being reappointed within one year of the most recent appointment end date need to be terminated in Workday.
- Enter *Appointment Expires On or After 6/1/2014* and *Appointment Expires On or Before* [current date]
- Consult chair or dean to determine which faculty are not returning, then terminate those who are not.

For proper instructions on terminating faculty, reference the Workday guides in the “Termination/Separation” section (<http://workday.training.yale.edu/>)

Example of prompts

Academic QA - Expired Current Appointments - Yale

Instructions This report lists those Academic Appointees having a current appointment with an Appoin Includes all Academic Affiliates and Academic Appointees (even if inactive).

* Note: The default date range of appointment end date is between today and 30 days ago

Academic Structure Node	<input type="text"/>
Academic Unit	<input type="text"/>
Track Type Category	<input type="text"/>
Academic Rank	<input type="text"/>
Appointment Type	<input type="text"/>
Appointment Expires On or After *	06 / 01 / 2016
Appointment Expires On or Before *	03 / 17 / 2017
EXCLUDE Academic Structure Node	<input type="text"/>
EXCLUDE Supervisory Organization	<input type="text"/>

Process for uploading salaries for specific groups of faculty

All professional schools-

- Using the Workday faculty merit process to upload faculty salaries for the following tracks of faculty:
 - Ladder faculty (tenured and tenure-track)
 - Non-ladder faculty with multi-year or recurring appointments and are 50% FTE or greater
 - If promotions will be uploaded through merit, need to Update academic appointment separately

Faculty of Arts and Sciences (FAS)-

- Salaries for faculty will be uploaded by the FAS Dean's Office

Office of International Students and Scholars (OISS) memo re. visas



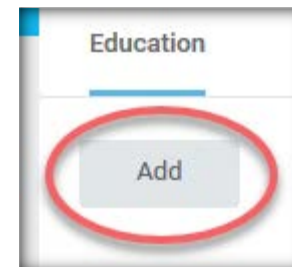
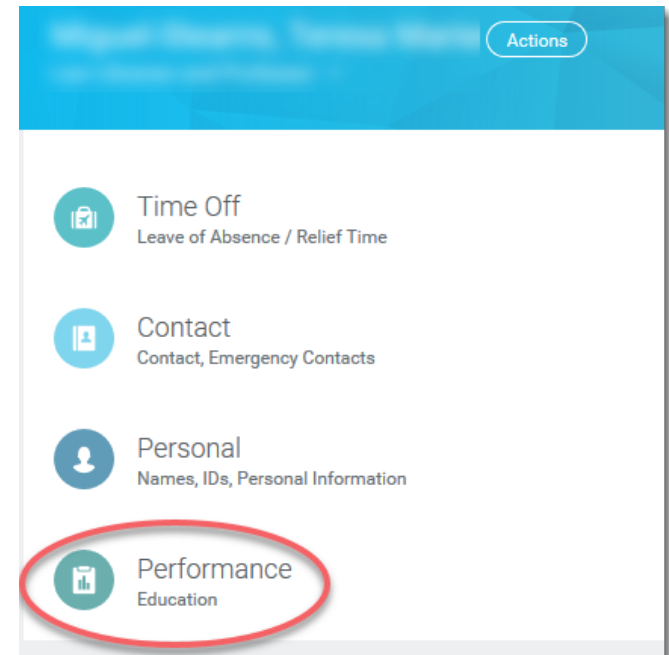
March 7, 2017 - Memo from Parker Emerson to all registered administrators in the ISD system:

- Temporary halt to a service called Premium Processing for H-1B visas until October 2017 (See <https://www.uscis.gov/news/alerts/uscis-will-temporarily-suspend-premium-processing-all-h-1b-petitions>).
- Requests submitted to OISS on or after **March 6, 2017** may not be able to be submitted under Premium Processing due to the last minute procedural change by USCIS.

Instructions for adding degree information

1. From the faculty member's profile record, scroll down to the Performance (Education) link.

2. In the next window, click Add.



Instructions for adding degree information

3. In the next window, enter

- Country
- School
- Degree
- Degree Received = "Yes"
- Year Degree Received (this will only appear upon selecting "Yes" for Degree Received)

4. Click Add to enter additional degrees.

5. Click Submit when done.

When adding a degree that has been received, in addition to the Country and School, please enter the Degree and "Yes" for Degree Received, and the Year Degree Received.

The screenshot shows a form for adding degree information. The fields and their values are:

Field	Value
Country	United States of America
School	Yale University
If you cannot find the school, check here	<input type="checkbox"/>
Degree	Doctor of Philosophy
Degree Received	Yes
Year Degree Received	2006
Field of Study	
First Year Attended	YYYY
Last Year Attended	YYYY
Grade Average	

Buttons: Remove, Add

