Office of Faculty Administrative Services (OFAS)

Information Session

March 16, 2018

Reminders and Updates
- New access to Fully Joint faculty
- Decommissioning the Faculty Information System (FIS)

Interfolio and search compliance

Checking faculty data using Workday reports

Merit process/annual salary increases

Topics for next session

Reminders and Updates

Ever feel like this?

Or this?

Or this?

Yale

Deadlines to submit transactions for processing, includes supporting documents and entry into Workday, to allow time to obtain approvals from the Offices of the FAS Dean and the Provost

➢ **FAS – 9th of every month**

➢ **Professional schools – 15th of every month**

Processing priority is given to items due in the current month or earlier

All transactions involving **compensation** require either a *Faculty Compensation Approval Form*, or a *Provostial Pre-Approval for Faculty Extra Compensation* (3501 FR.08H) form*.

> * This form must be submitted for approval to provostforms@yale.edu **prior** to the work taking place.

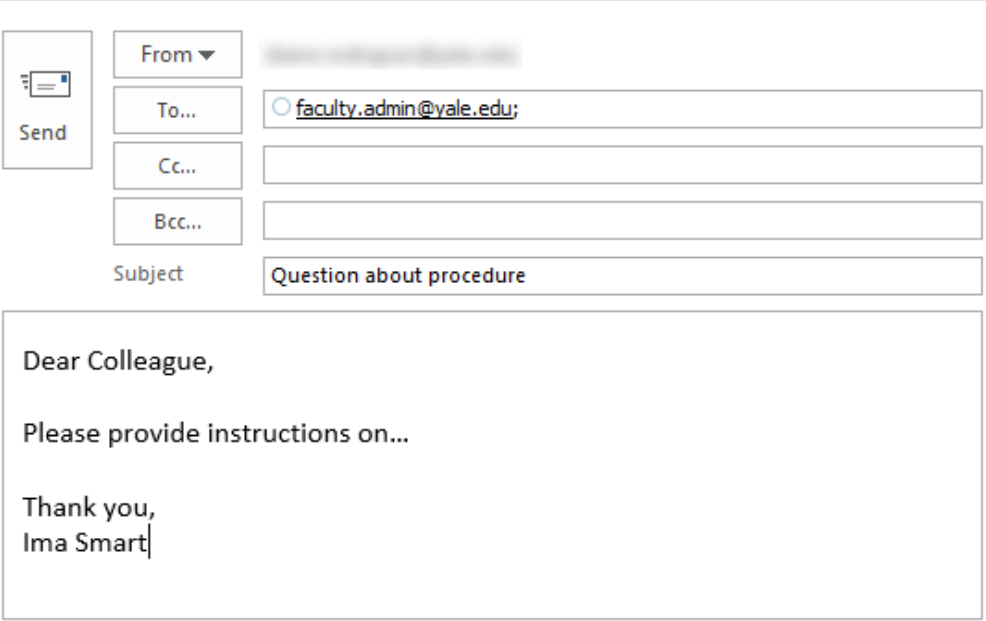**All** transactions involving **compensation** or **appointments** require **supporting documentation**.

- E.g. An offer letter, invoice, email from dean to faculty member that includes
  - Dates
  - Rank or description of work
  - Amount

Reminder - Questions

Please submit all questions regarding policies and procedures to faculty.admin@yale.edu.

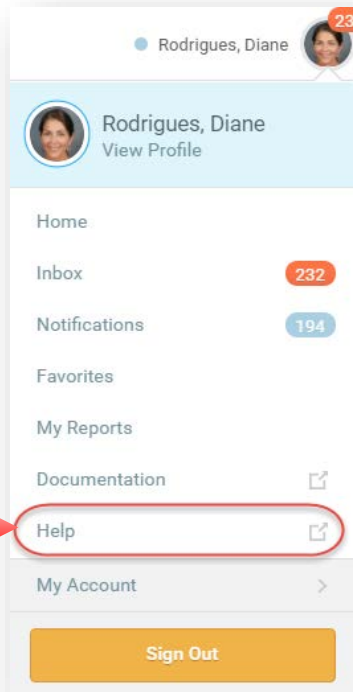This will create a ticket in our tracking system (Salesforce).

Benefits:

✓ Helps you to track your question(s)

✓ Reduces the risk of getting buried in one of our email boxes

✓ Insures that we will follow up

Reminder – Workday help

Yale

Quickly access Workday training materials by clicking on the Help option on the profile menu.

Use the Change Request Form to submit requests for changes or new training materials.

Workday@Yale Training

| Home | Training | Support | News | About | Functionality Update |

✓ Logged in via CAS as *Diane Rodrigues*.

Workday Financials

Workday Financials, the replacement for Yale's Oracle financial management system, launched on July 3 for central process owners and on July 5 for business offices and other staff. The Workday Financials training program was created to transition staff to a new system and offer a variety of learning experiences.

Workday HCM: HR, Payroll, Academic

Yale launched Workday Human Capital Management (HCM) in 2015. Training materials for HCM, which delivered improved human resources and payroll to the Yale community, were designed to meet the University's current and future operating requirements for HCM.

Change Request

Use the Change Request form to identify updates to existing training materials or to request new training materials be added to the Workday curriculum. The Training Team will review the request and determine the next course of action.

Update – Fully Joint faculty

In the past, your access to information for fully joint faculty was limited if the faculty member was not in your supervisory org.

Due to Workday access enhancements, you are now able to view additional information, such as:

- Leave history
- Position details
- Contact information
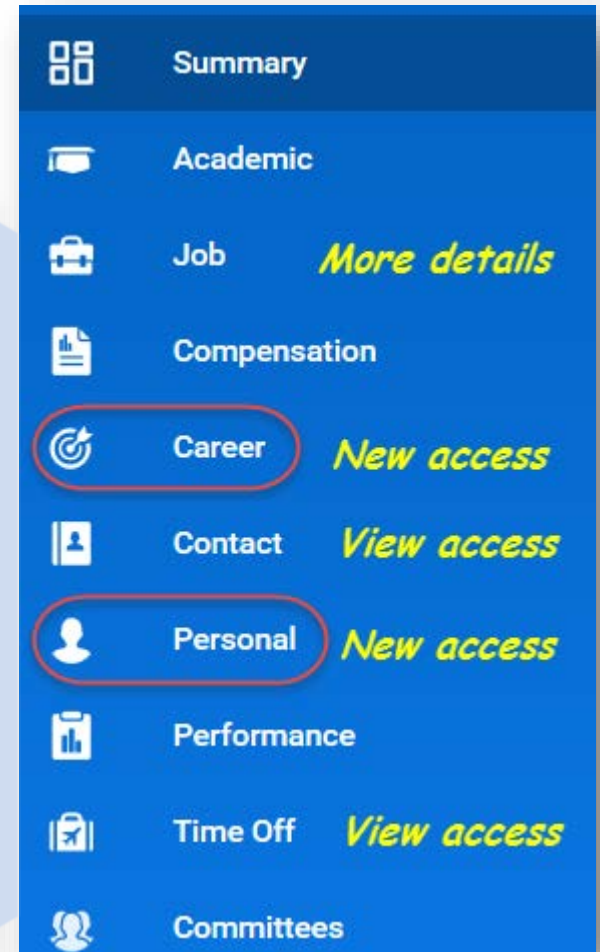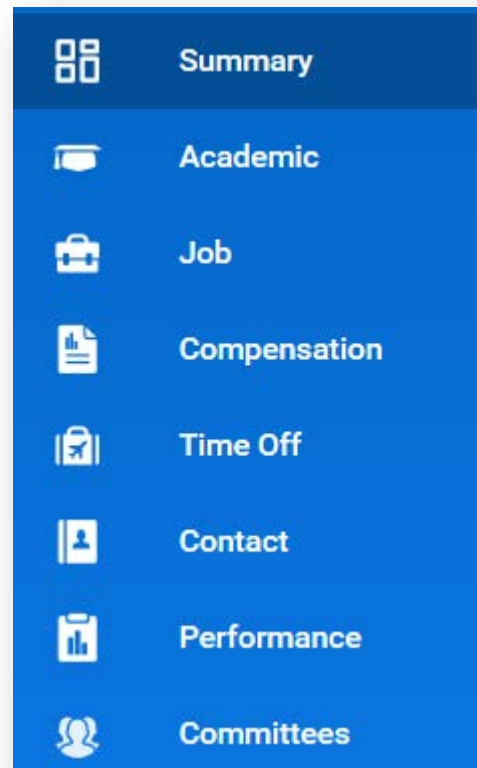
Comparison of prior menu list versus new access list

Faculty Information System (FIS) will be decommissioned 3/31/2018.

Appointment and leave history is available in Workday.

The [Academic Course and Committee Information Training Guide](#) provides details on accessing this information using the new tool through Tableau.

If you do not have access, send email to faculty.admin@yale.edu.
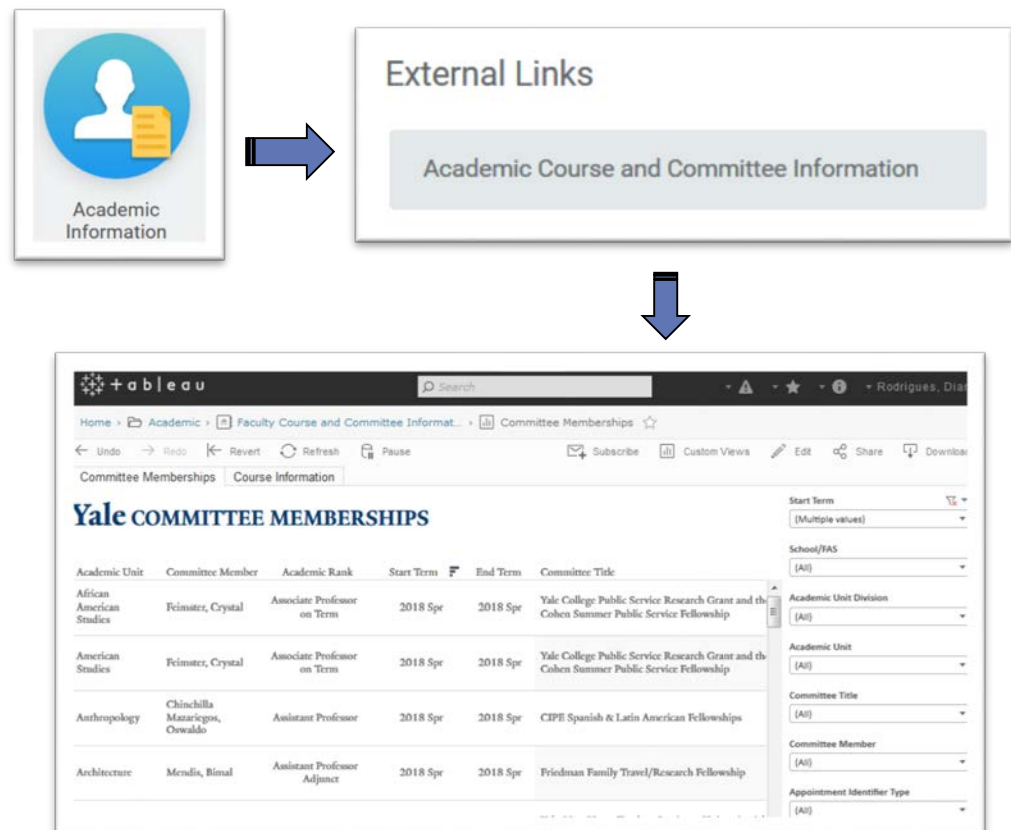
Interfolio and search compliance

Interfolio Faculty Search

- A secure cloud-based system that can be used by all academic units at Yale for all searches, including faculty, postdocs, and other academic positions.

- General Counsel has requested that all faculty applicants and targeted candidates use this system to self-report diversity information.

Help Keep Yale in Compliance

- **Must be in Compliance**
  - With the US Department of Labor, Office of Federal Contract Compliance Program (OFCCP). Every institution that deals with or has federal contract and grants needs to be in compliance with the laws and regulations by the OFCCP.
  - With Yale General Counsel
  - For audits and reporting needs. The more information provided via the system, the more complete the data is for an audit.

- Forms: Faculty Search Questionnaire (FSQ) If we start to track the applicants the same way that is done on these forms, then someday the hope is to replace the need to fill out forms.

- Interfolio is the University's record.

- Let's use the system to help us.

How do we do this?

1. By properly tracking the applicants for all searches.

- Every applicant needs to be on the Applicant list; especially those that will be interviewed and for sure those that are on the FSQ are on the applicant list.

- Either provide the http://apply.interfolio...URL or Add them to the list. Do not wait until the last minute.

Read | **Email** | **Status** ▾ | **Tag** ▾ | ⋮

Tags

Status dropdown menu:
- Hired
- Longlist
- Final Candidate(s)/Shortlist
- Interview
- Proposed Candidate 1
- Proposed Candidate 2
- Proposed Candidate 3
- Proposed Candidate (multiple)
- Withdrew before offer
- Offer Extended 1
- Offer Extended 2
- Offer Extended 3
- Offer Extended (multiple)
- Offer Accepted
- Offer Declined

↻ Remove Status
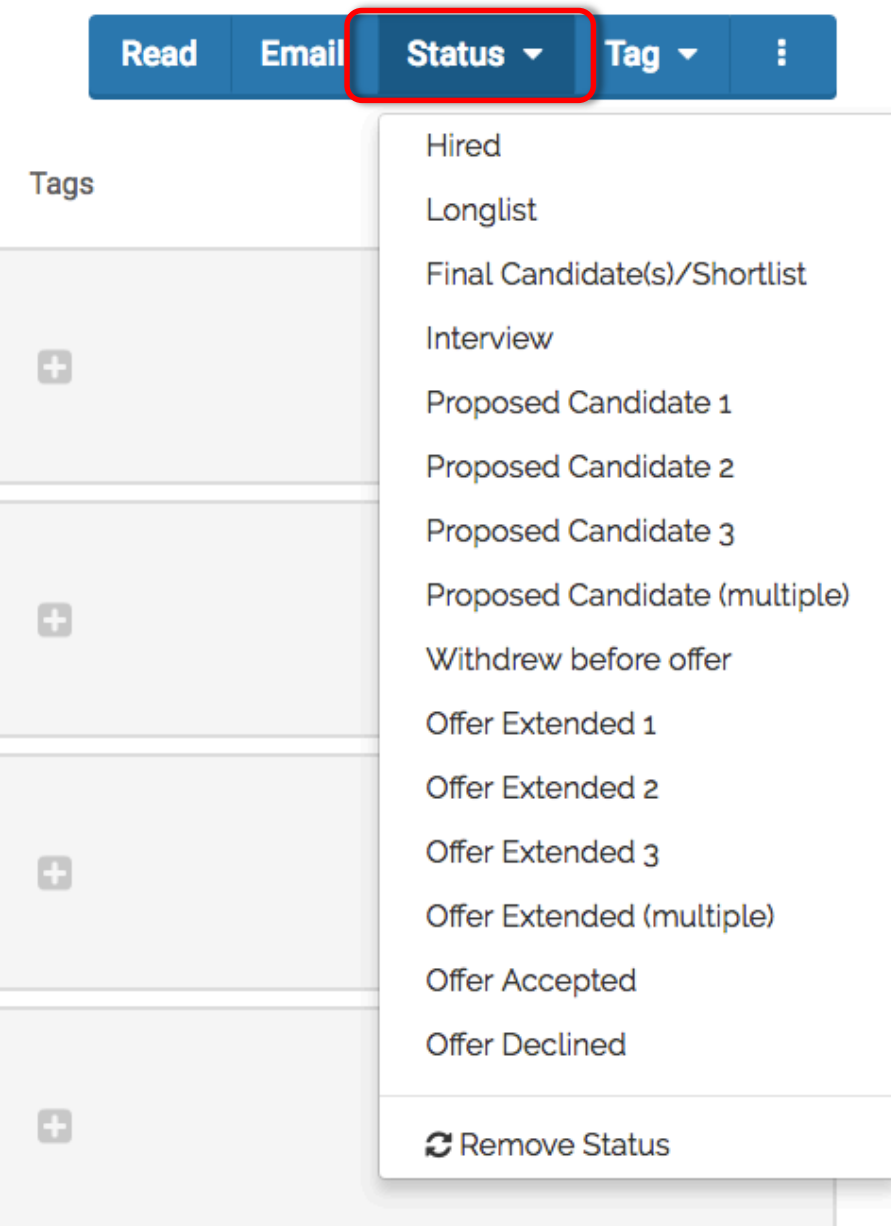
- At best, be sure to use the applicant statuses especially Hired and Offer Declined.

- To archive a position, is to Close Position. You will be asked did you find someone yes, or no?
  - If yes, that person(s) name needs to be in the list and it has to have an applicant status Hired, Offer Declined, etc.
  - If no, add a note and have the appropriate statuses on the applications.

- And even better, use the other statuses- they are there to help you as the search progresses.
- Contact Pam or myself if you need help with use of a status.

The Applicant List – what is our goal?

- Track the applicants as they move during the search process.
- To make it look like the list on the FSQ.

Note: above are examples

TWO TYPES OF STATUSES:
There is also the Position (Search) status

Close positions to Archive

- Select the title/name of the position from your list. Note: the position status should be Position Closed.
- In the upper right area, select the Closed Position at the very bottom of the drop down menu

Close positions to Archive

Step 1

- Select whether an applicant was chosen: Yes or No.

- If No, add a note stating why the search did not produce a final candidate.

- If Yes, select the name(s) from the applicant list. (This will include those applicants that declined as well as were Hired.)

- Click continue

Step 2

- Position status should be set at, Position Closed. If not, cancel and adjust the position status.
- Do Not send a message to all applicants since these searches took place a while back.
- Click Finish

CLOSING POSITION FOR:

Jack Miller Post-Doctoral Associate

POSITION DETAILS

STEP 1: SELECT APPLICANT   **STEP 2: COMPLETE THE SEARCH**

M

Position Status

Position Closed

F

T

- Applicants **cannot** view this status.
- Applicants **cannot** update their application materials.

Message

☐ Send a message to all applicants with this change

Finish   Cancel

Quick Review - Key Points

- Update statuses on only those who are progressing to the next round. Do not delete the applicant status on the others.

- ALL APPLICANTS need to be listed in the applicant list page – especially those on the FSQ.

- Identify and enter the Applicant Status: Hired or Declined Offer or if no one was selected, no changes to status.

- Then, when confirmed, Close Position (very bottom of the list) to Archive.

Checking faculty data using Workday reports

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

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

- *Academic QA - Expired Current Appointments – Yale*

- *Academic QA - Missing Degrees – 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* **7/1/18** *And* **6/30/19**.

– 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.

Workday reports to be run

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
- X Faculty
- X Other Academic

Academic Structure Node (Primary Appt)

Academic Unit (Primary Appt)

Track Type Category (Primary Appt)

Appt Type (Primary Appt)

Organizations *
- X English - Office of the Chair (Hammer, Langdon L)

Include Subordinate Organizations ✓

Appointee

Leave Type (Including Family)

Leave Request Status

Include Leave Requests Pending Approval ✓

On Leave Between 07 / 01 / 2017

And 06 / 30 / 2018

Workday reports to be run

Academic QA - Expired Current Appointments – Yale

Provost's Office perspective: All faculty who do not have a current appointment should 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/)

Workday reports to be run

Example of prompts

Academic QA - Expired Current Appointments - Yale

Instructions This report lists those Academic Appointees having a current appointment with an Appoir
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	☰
Academic Unit	☰
Track Type Category	☰
Academic Rank	☰
Appointment Type	☰
Appointment Expires On or After	★ 06 / 01 / 2016
Appointment Expires On or Before	★ 03 / 17 / 2017
EXCLUDE Academic Structure Node	☰
EXCLUDE Supervisory Organization	☰

Academic QA - Missing Degrees - Yale

- Checks for faculty who are missing degree information

- Incredibly important for a variety reasons, such as
  - Institutional reporting, e.g. U.S. News and World Report
  - 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.

Workday reports to be run

Example of prompts

Merit process/annual salary increases

- ➢ Annual process for uploading salaries for specific groups of faculty. Usually includes the following:

  - ➢ Ladder faculty (tenured and tenure-track)
  - ➢ Non-ladder faculty with multi-year or recurring single-year appointments and are 50% FTE or greater

- ➢ Slightly different procedure for Professional Schools versus FAS

- ➢ Provost's Office is final approver

Professional Schools

– Use Workday faculty merit process to upload salaries

– Task assigned to Business Partner, but can be delegated

– Promotions
- Job Profile – Business Partner should enter on merit grid
- Academic appointment – Update manually

– Wave 1 and Wave 2 timelines – Wave 2 includes Art Architecture, Divinity, and Music

Promote	Position	Job Profile	Business Title	Promotion %	Promotion Amount
Yes	✗ P7721 Associate Research Scientist	Associate Research Scientist	Associate Research Scientist	0.00%	0.00

Yale

Professional Schools Merit 2018 Timeline

Date	Activity
March 8, 2018	• Provost Office communicates to Professional Schools
March 16, 2018	• Wave 1: Faculty Merit Business Process begins
May 4, 2018	• Wave 1: Schools submit Faculty Merit recommendations to Provost Office in Workday
May 16, 2018	• Provost Office approves Wave 1 Faculty Merit recommendations; Wave 1 Faculty Merit process completed
May 30, 2018	• Wave 2: Faculty Merit Business Process begins
June 27, 2018	• Provost Office approves Wave 2 Faculty Merit recommendations; Wave 2 Faculty Merit process completed

Yale

Faculty of Arts and Sciences (FAS)

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

– Promotions

- Enter full promotion, i.e. Job Change and Update to Academic appointment, manually in workday.
  – Do not change compensation.

- Send email to faculty.admin@yale.edu upon entering.
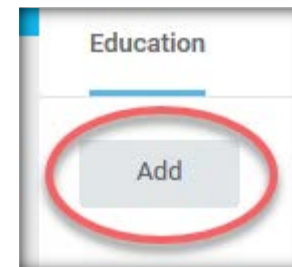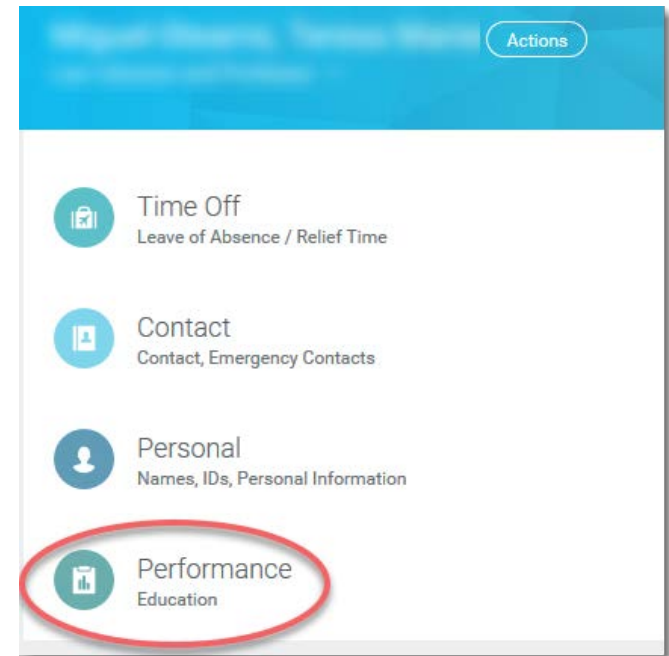
Topics for next session

> ➢ **Onboarding new faculty**
> ➢ **Off-boarding departing faculty**
> ➢ **Retiring faculty, including phased retirement and emeritus**
> ➢ **Workday reports and frequencies**

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.

Country	*	X United States of America
School	*	X Yale University
If you cannot find the school, check here		☐
Degree		X Doctor of Philosophy
Degree Received		Yes
Year Degree Received		2006
Field of Study		
First Year Attended		YYYY
Last Year Attended		YYYY
Grade Average		

Remove

Add