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?
ANTI-STRESS KIT

Directions:
1. Place on firm surface
2. Follow directions provided in circle
3. Repeat until you are anti-stressed, or become unconscious
Reminder – Health tip
Banging your head against the wall burns 150 calories an hour. So get to it!
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** – 9\(^{th}\) of every month
- **Professional schools** – 15\(^{th}\) 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
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

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.
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.
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.
• 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
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.
thank you
Checking faculty data using Workday reports
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 - Expired Current Appointments – Yale

– Academic QA - Missing Degrees – Yale
Workday reports to be run

**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.
Example of prompts

<table>
<thead>
<tr>
<th>Instructions</th>
<th>This report includes Leave Requests that have been approved and those that are pending (if 'Include Leave Requests Pending Approval' is selected). Academic Unit (for the primary appointment), Organization (including subordinate organizations).</th>
</tr>
</thead>
</table>
| 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  |
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](image)

Instructions: This report lists those Academic Appointees having a current appointment with an Appointment End Date between today and 30 days ago. It 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
Workday reports to be run

**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
<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 8, 2018</td>
<td>• Provost Office communicates to Professional Schools</td>
</tr>
<tr>
<td>March 16, 2018</td>
<td>• Wave 1: Faculty Merit Business Process begins</td>
</tr>
<tr>
<td>May 4, 2018</td>
<td>• Wave 1: Schools submit Faculty Merit recommendations to Provost Office in Workday</td>
</tr>
<tr>
<td>May 16, 2018</td>
<td>• Provost Office approves Wave 1 Faculty Merit recommendations; Wave 1 Faculty Merit process completed</td>
</tr>
<tr>
<td>May 30, 2018</td>
<td>• Wave 2: Faculty Merit Business Process begins</td>
</tr>
<tr>
<td>June 27, 2018</td>
<td>• Provost Office approves Wave 2 Faculty Merit recommendations; Wave 2 Faculty Merit process completed</td>
</tr>
</tbody>
</table>
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
Topics for next session

- Onboarding new faculty
- Off-boarding departing faculty
- Retiring faculty, including phased retirement and emeritus
- Workday reports and frequencies
QUESTIONS
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.
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.