

# Office of Faculty Administrative Services

# Information Session

March 23, 2022

# Agenda

Reminders and Updates

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OFAS Training – Spring 2022

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Academic Leaves and Relief Time

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Workday Reporting and Data Clean-up

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# Reminders and Updates

# Reminder

*Refer to the [Administrative Processes](#) page on the OFAS website for step-by-step instructions on submitting transactions.*



**Faculty Administrative Services**

HOME SEARCHES & APPOINTMENTS ACADEMIC CAREER EVENTS **ADMINISTRATIVE PROCESSES**

CONTACT US

HOME > ADMINISTRATIVE PROCESSES > ADMINISTRATIVE PROCESSES

## Administrative Processes

Workday is the sole source for faculty appointments and employee records. **Prior** to entering any information in Workday, please follow the procedures below.

**Guidelines for processing transactions:**

Note: For assistance with the compensation process, go to [Managing Compensation for Faculty](#).

Deadlines:

# Reminder

- ❖ *Supporting documentation* is required for all transactions in Workday
  - ❖ Including resignations, promotions, and compensation changes
- ❖ *Merge all documents into a single pdf*
  - ❖ Instructions: <https://facultyadmin.yale.edu/instructions-pdf-merger>
  - ❖ Merge as a **binder**, not as a portfolio
  - ❖ Instructions include a workaround for merging secure documents

7. Save the document as a new PDF with the appropriate file name

## Save a PDF with Multiple Signatures

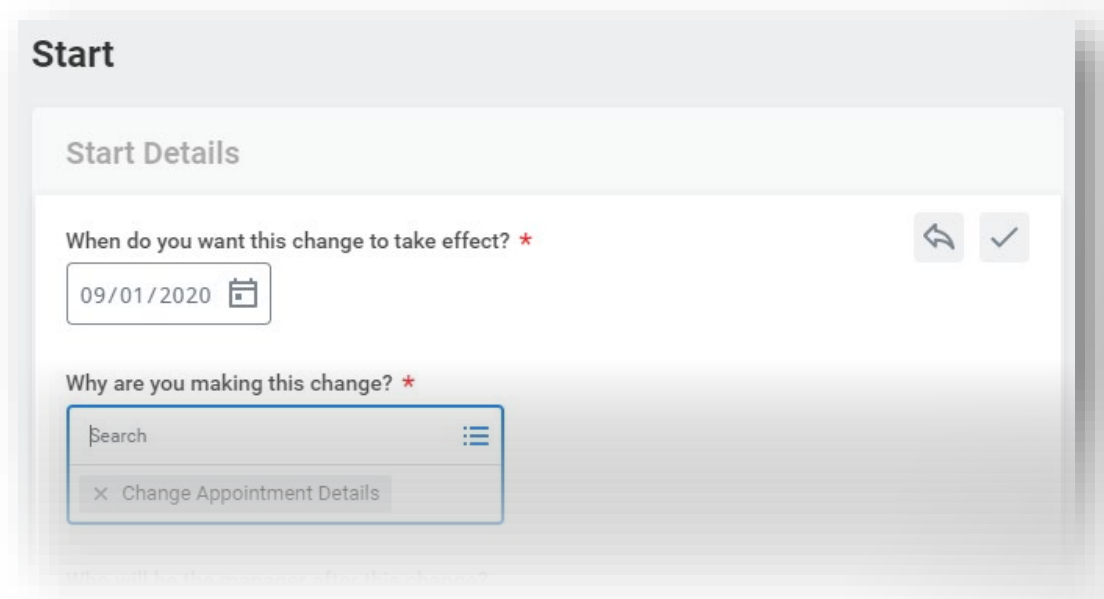
Sometimes PDFs have hidden permissions, and do not save documents with multiple electronic signatures. Here is a suggested workaround if you receive an error message during the merger.

1. Click **File**, then select **Print**.
2. In the Printer drop-down menu, select **Adobe PDF** or **Microsoft Print to PDF**, whichever your software allows.
3. Click **Print** (**Note:** It will not actually print the document. Instead, it will launch the save menu).
4. Enter the File name, select the destination on your computer, and click **Save**.
5. Add additional signatures to the resaved document if necessary.
6. Save the new document.

# Reminder

In Workday...

- ❖ *Retroactive changes* that impact compensation need to be monitored to ensure the desired outcome is achieved
- ❖ **All** Payroll Adjustments – Underpayments and Overpayments – should be coordinated with OFAS
  - ❖ Send forms to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)

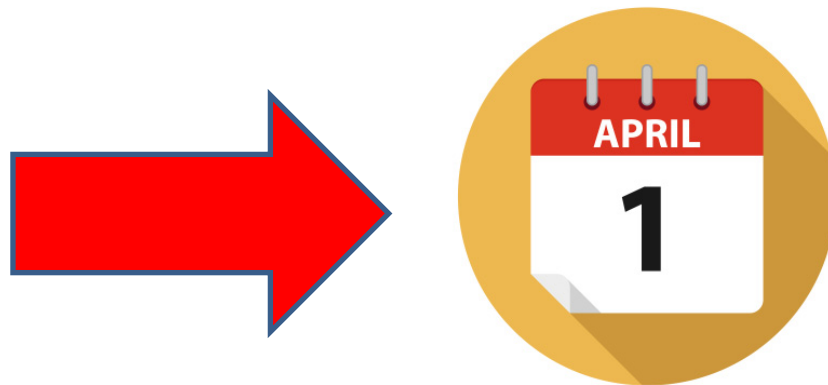


The screenshot shows a 'Start' form in a Workday interface. The form is titled 'Start' and has a sub-section 'Start Details'. The first field is 'When do you want this change to take effect? \*' with a date input field containing '09/01/2020' and a calendar icon. To the right of this field are two icons: a refresh icon and a checkmark icon. The second field is 'Why are you making this change? \*' with a search input field containing 'Search' and a menu icon. Below the search field is a dropdown menu with one option: 'x Change Appointment Details'. A large red arrow points from the left towards the date input field.

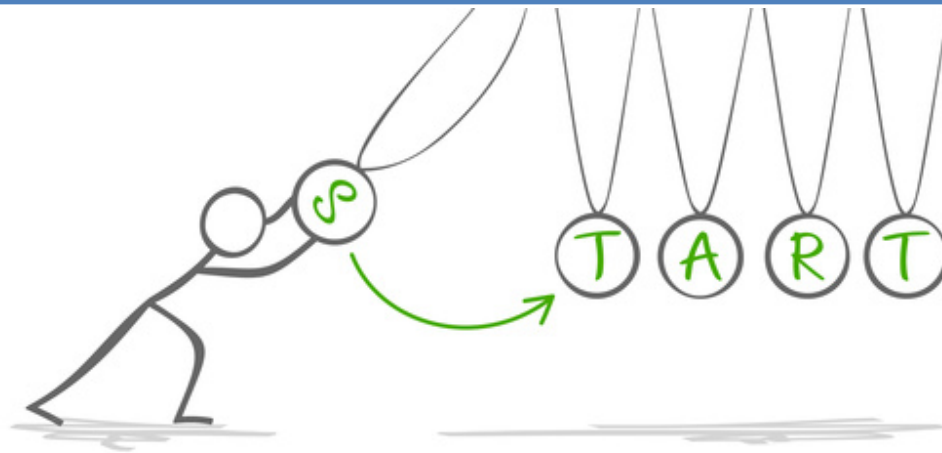
# Update

Annual Merit process in Workday will launch 4/1/2022

- ❖ This is the annual raise process
- ❖ All pending transactions in Workday that are associate with the employee record need to be completed
  - ❖ If not completed, they will need to be terminated and re-entered



# OFAS Training – Spring 2022





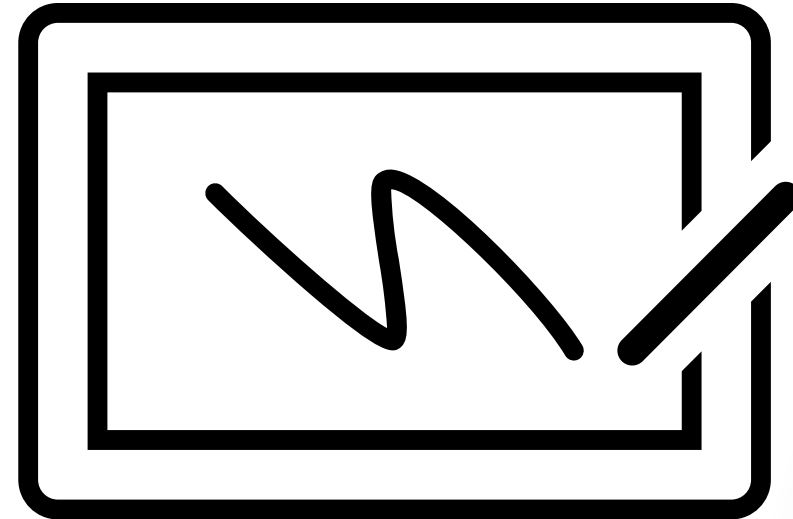
# OFAS Training – Spring 2022

- ❖ Wednesdays, March 23 through June 29, 2022
- ❖ 2:00-3:00 PM
- ❖ Via Zoom:  
<https://yale.zoom.us/j/92239100300?from=addon>
- ❖ Three different formats: Information Sessions, Workday or Interfolio training, or Open Forum
- ❖ Refer to OFAS calendar for upcoming sessions
  - ❖ <https://facultyadmin.yale.edu/calendar>
- ❖ Presentations and recordings will be available in Box
  - ❖ <https://yale.app.box.com/folder/146250036274>

# OFAS Training – Spring 2022

## Information Session

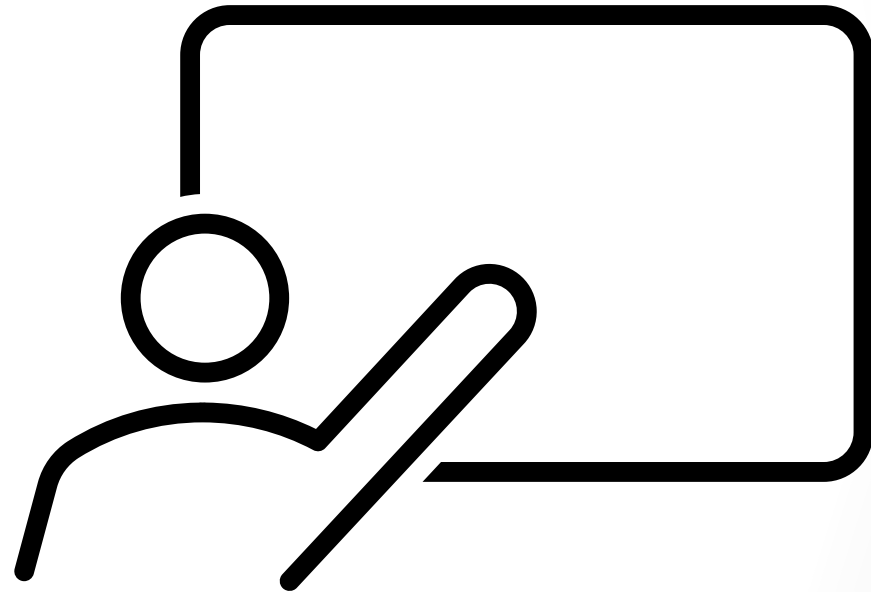
- ❖ Opportunity for OFAS to communicate important information
- ❖ Topics range from general reminders and updates to modifications to systems to policy and procedure changes
- ❖ Topics relate to the annual cycle of events
  - ❖ E.g. recruiting, leave requests, departures and retirements, etc.



# OFAS Training – Spring 2022

Workday or Interfolio training

- ❖ Both systems are integral to faculty appointments throughout Yale
- ❖ Each session will focus on a specific activity or business process
- ❖ One-on-one sessions will also be offered upon request
  - ❖ Send email to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)



# OFAS Training – Spring 2022

## Open forum

- ❖ Formerly known as Helpful Hump Day
- ❖ Open forum to ask questions related to administering faculty appointments, compensation, and other events
- ❖ First 15-20 minutes may be dedicated to a specific topic



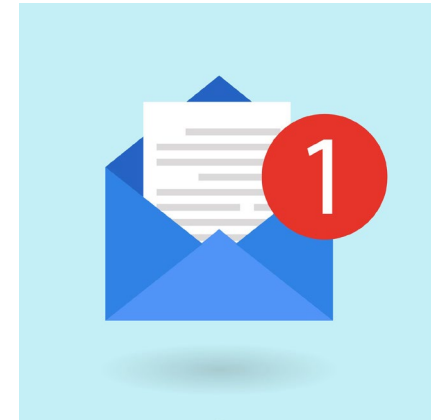
# Academic Leaves and Time Off

Completing the process  
and ad hoc changes

# Academic Leaves and Relief Time

*All first-round decisions have been sent from the Provost's Office or FAS Dean's Office.*

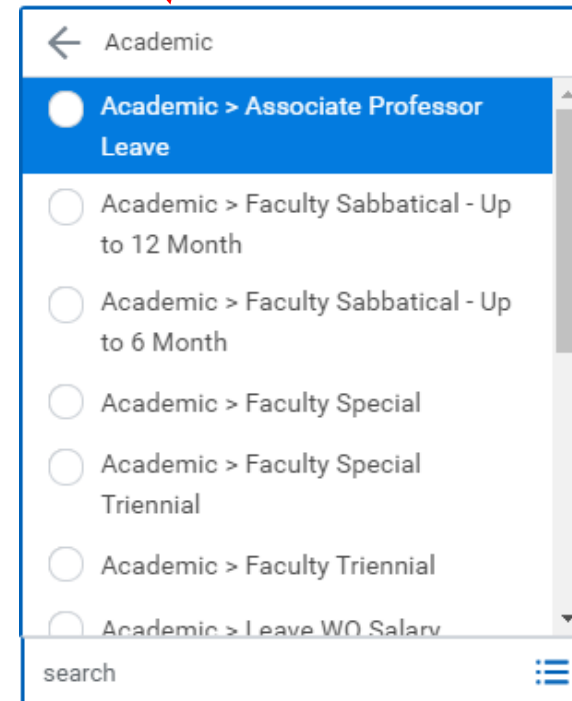
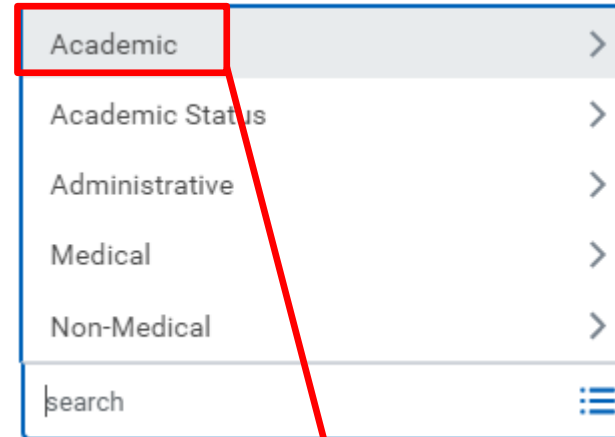
*Late requests are still being processed*



# Academic Leaves – Completing the process

*Upon receipt of approval*

- ❖ Enter approved leave(s) in Workday
  - ❖ Use the Leave Type approved in the memo
  - ❖ Reference: Workday training guide, *Leave of Absence: Absence/Relief Time – Academic (Time Off)*
    - ❖ [Leave of Absence: Absence/Relief Time – Academic \(Time Off\) | Workday@Yale Training](#)



# Academic Leaves – Completing the process

- ❖ All academic leaves *begin on either July 1 or January 1 and must end on either June 30 or December 31.*
- ❖ Add Costing Treatment on paid research leaves: *FacSabbatical*

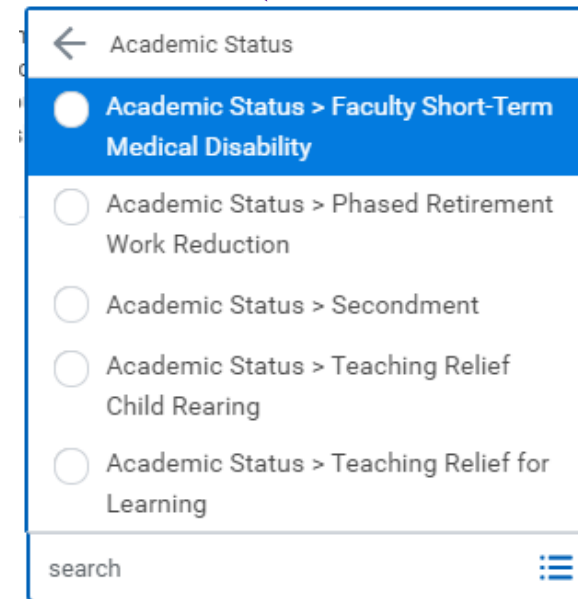
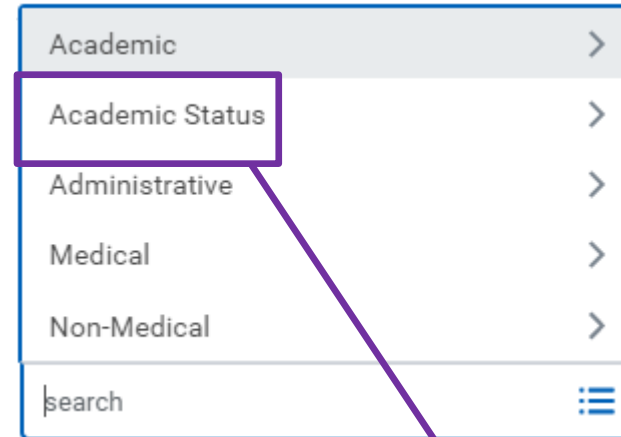
Leave period	Dates to enter in Workday
Fall 2022	First Day of Leave = 07/01/2022, Estimated Last Day = 12/31/2022
Spring 2023	First Day of Leave = 01/01/2023, Estimated Last Day = 06/30/2023
Academic year 2022-2023	First Day of Leave = 07/01/2022, Estimated Last Day = 06/30/2023
Calendar year 2023	First Day of Leave = 01/01/2023, Estimated Last Day = 12/31/2023



# Relief Time – Completing the process

## ❖ Relief time or time off

- ❖ Short-Term Medical Disability (SMD)
  - ❖ Teaching Relief for Child Rearing (TRC)
  - ❖ Phased Retirement Work Reduction (PR)
  - ❖ Secondment
  - ❖ Teaching Relief for Learning (TRL - FAS only)
- ❖ In Workday under Academic Status
  - ❖ **DO NOT** add a costing treatment
  - ❖ OFAS enters extensions to appointment terms when appropriate for SMD and TRC



# Academic Leaves – Completing the process

*Verify that all leaves are entered*

❖ Run Workday report, *Academic - Employees on Leave, by Academic Unit - Yale*

❖ Recommendation: Run this report prior to doing any data entry to avoid duplication

*Verify that Costing Treatment is entered*

❖ Run Workday report, *Payroll Results Verification with Costing – Yale*

❖ Look for “On Leave” appended to faculty member’s name

### Academic - Employees on Leave, by Academic Unit - Yale

Instructions This report includes Leave Requests that have been approved and those that are pending (if "Include Leave Requests Pending Approval" is checked). Prompts include: Academic Structure Node (for the primary appointment), Academic Unit (for the primary appointment), Organization (including subordinates), Employee Type (defaulted to Faculty and Other Academic), and Appointee.

Employee Type  Faculty  Other Academic

Academic Structure Node (Primary Appt)

Academic Unit (Primary Appt)

Track Type Category (Primary Appt)

Appt Type (Primary Appt)

Organizations  Ecology and Evolutionary Biology - Office of the Chair (Near, Thomas J)

Include Subordinate Organizations

Appointee

Leave Type (Including Family)

Leave Request Status

Include Leave Requests Pending Approval

On Leave Between 09 / 01 / 2020

And 05 / 31 / 2021

Enter the chair's or school dean's highest org

# Academic Leaves – Ad hoc changes

*Throughout the year...*

- ❖ **Requests** for leaves and relief time may be submitted throughout the year using the form, *Request for Faculty Leave or Teaching Relief*
  - ❖ (Linked from <https://facultyadmin.yale.edu/academic-career-events/leaves-teaching-relief> )
- ❖ **Cancellations** – send to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)
  - ❖ OFAS will need to rescind in Workday
- ❖ **Changes** – faculty member must submit a new form
- ❖ Don't forget to update the costing treatment, *FacSabbatical*



Direct questions to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)

# Academic Leaves – Returning faculty

**30 days prior to the end date**, Workday will send a task to the original submitter of the leave to return the faculty member from the leave or time off.

- ❖ The send date is based on the **original entry**.
- ❖ Thus, if the dates of the leave or time off changes, the To Do does not change



Direct questions to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)

# Workday Reporting and Data Clean-up

# Workday data clean-up

*It's time for spring cleaning!!*

*Reference reporting presentation online at [Workday reports for academics | Faculty Administrative Services \(yale.edu\)](https://workdayreports.yale.edu)*



# Workday Academic Reporting

Frequency	Report Name	Who should run
Monthly, or as needed	My Business Processes in Flight – Yale	Any initiator
Monthly	Payroll Results Comparison – Yale	Business Partner (BP)
Monthly	Academic - Expiring Appointments – Yale	A&P Specialist
Bi-annually, Each term	Academic - Compensation Details – Yale	Business Partner
Bi-annually, Each term	Academic QA - Expired Current Appointments – Yale	A&P Specialist
Bi-annually, Each term	Academic QA - Missing Degrees - Yale	A&P Specialist
Bi-annually, Each term	Contingent Workers with Expiring Contracts - Yale	Business Partner
Annually, in Spring	Academic - Employees on Leave, by Academic Unit	Academic HR Support Specialist (AHRSS)
Annually, in Spring	Academic - Ladder Faculty Review – Yale	A&P Specialist
Annually, in Spring	Academic - Non-Ladder Faculty Review – Yale	A&P Specialist
Annually	Supervisory Organization Details - Yale	BP or AHRSS

# *Take Action!*

- Present list of faculty with expiring appointments to dean or department chair
  - Determine action to be taken
    - Reappointment, promotion, termination, transfer
  - Faculty who are not being reappointed or transferred in the coming year must be terminated
- Investigate any unknowns





# Thanks for attending!

The recording of this presentation will be uploaded to Box

- ❖ Folder title: OFAS Information and Training Sessions
- ❖ <https://yale.app.box.com/folder/146250036274>

All graphics in this presentation are compliments of Office 365.