

# Office of Faculty Administrative Services

# Information Session

March 9, 2021



# Agenda

Reminders and Updates

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Retroactive Job or Compensation Changes

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Helpful Hump Day

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Academic Leaves and Relief Time  
– Completing the process

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Workday data clean-up

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# Reminders and Updates



# Reminder

- ❖ *Supporting documentation is required for all transactions in Workday*
- ❖ *Merge all documents into a single pdf*
  - ❖ Instructions are online at <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

## *Training*

- ❖ Video for new Workday admins

- ❖ *Navigating Workday for Academics,*  
<https://workday.training.yale.edu/>

- ❖ Live training

- ❖ *Understanding Faculty Appointments at Yale*

- ❖ Scheduled on request



# Update

## *Training Guides for Workday*

### ❖ Training guide consolidation

#### ❖ *Hiring or Contracting Academics* replaces three guides:

- ❖ *Hire Faculty Process*

- ❖ *Create Job Requisition: Clinical Fellows & Psychiatry Residents (Non-STARS)*

- ❖ *Create Job Requisition: Academic Contingent Worker (Non-STARS)*

#### ❖ *Academic Reason Codes* will be replaced by *Academic Tracks, Reason Codes, and Menu Options*

#### ❖ *Job Changes for Academics* will be a consolidation of all job change business processes for academics



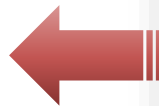
# Retroactive Job or Compensation Changes



# Retroactive Job or Compensation Changes

In Workday...

- ❖ As best as possible, transactions should provide an accurate historical account
- ❖ However, some changes may have a detrimental impact to benefits and taxes
- ❖ **All** updates should come to OFAS to determine feasibility
  - ❖ OFAS may need to consult with Payroll
- ❖ **All** Payroll Adjustments – Underpayments and Overpayments – should be coordinated with OFAS
  - ❖ Send forms to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)



Start

Start Details

When do you want this change to take effect? \*

09/01/2020

Why are you making this change? \*

× Change Appointment Details



# Helpful Hump Day



# Helpful Hump Day

- ❖ Open forum for asking questions related to administering faculty appointments, compensation, and other events
- ❖ First 15-20 minutes may be dedicated to a specific topic
- ❖ Bi-weekly on Wednesdays
  - ❖ Alternating times
    - ❖ 9:00-10:00 AM
    - ❖ 3:00-4:00 PM

## First sessions:

**March 17 - Opening topic: Interfolio**

**March 31 - Opening topic: Running reports**





# Academic Leaves and Time Off

Completing the process  
and ad hoc changes



# Academic Leaves and Relief Time

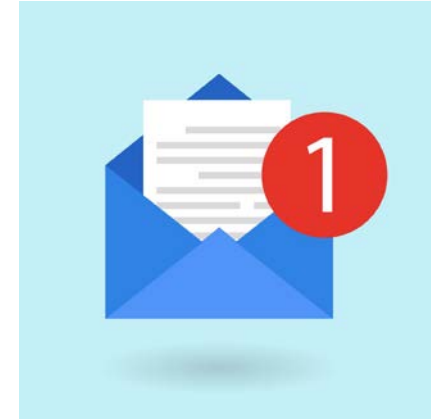
## *Upon receipt of approval*

### ❖ Professional Schools

- ❖ Communicate approvals to faculty
- ❖ cc: [diane.Rodrigues@yale.edu](mailto:diane.Rodrigues@yale.edu)

### ❖ FAS departments

- ❖ No need to send copies of approval memos to Diane or to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)





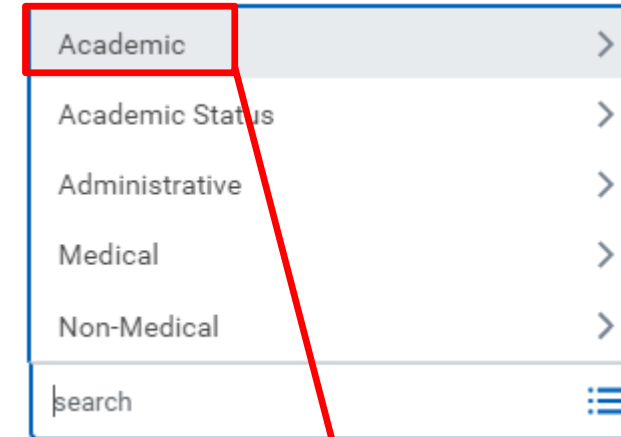
# Academic Leaves – Completing the process

## *Upon receipt of approval*

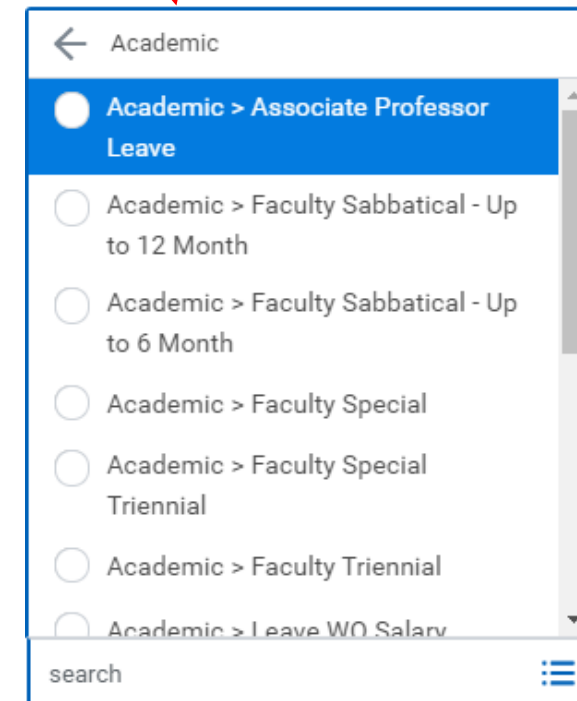
- ❖ Enter approved leave(s) in Workday
  - ❖ Use the Leave Type approved in the memo
  - ❖ Reference: Workday training guide, *Leave of Absence: Absence/Relief Time – Academic (Time Off)* online at <https://workday.training.yale.edu/>

NOTE to FAS departments:

The **Initial Appointment Leave (IAL)** is not yet available for selection in Workday. For now, select Morse or Junior Faculty Fellowship.



Academic	>
Academic Status	>
Administrative	>
Medical	>
Non-Medical	>
search	☰



← Academic
<input checked="" type="radio"/> Academic > Associate Professor Leave
<input type="radio"/> Academic > Faculty Sabbatical - Up to 12 Month
<input type="radio"/> Academic > Faculty Sabbatical - Up to 6 Month
<input type="radio"/> Academic > Faculty Special
<input type="radio"/> Academic > Faculty Special Triennial
<input type="radio"/> Academic > Faculty Triennial
<input type="radio"/> Academic > Leave W/O Salary
search ☰



# 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: *FacSabbatical*

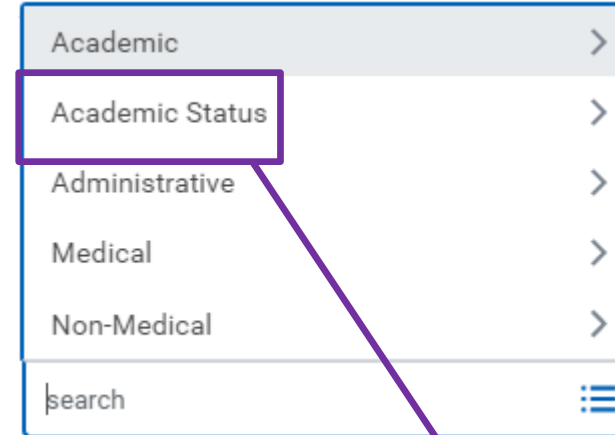
Leave period	Dates to enter in Workday
Fall 2021	First Day of Leave = 07/01/2021, Estimated Last Day = 12/31/2021
Spring 2022	First Day of Leave = 01/01/2022, Estimated Last Day = 06/30/2022
Academic year 2021-2022	First Day of Leave = 07/01/2021, Estimated Last Day = 06/30/2022
Calendar year 2022	First Day of Leave = 01/01/2022, Estimated Last Day = 12/31/2022



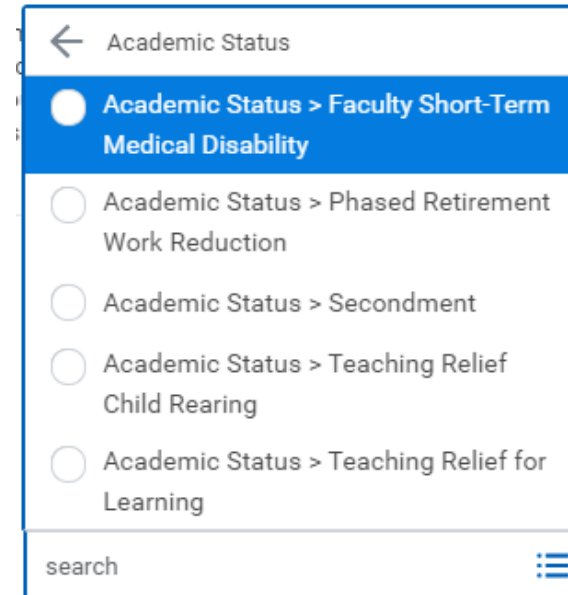
# Relief Time – Completing the process

## ❖ 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 costing treatment
  - ❖ OFAS will enter relevant extensions to appointment terms



A screenshot of a dropdown menu titled 'Academic'. The menu is open, showing several options: 'Academic Status', 'Administrative', 'Medical', and 'Non-Medical'. Each option has a right-pointing chevron. The 'Academic Status' option is highlighted with a purple rectangular box. A purple arrow points from this box down to the 'Academic Status' option in the second screenshot.



A screenshot of a selection screen titled 'Academic Status'. It features a list of radio button options. The first option, 'Academic Status > Faculty Short-Term Medical Disability', is selected and highlighted with a blue background. Other options include 'Academic Status > Phased Retirement Work Reduction', 'Academic Status > Secondment', 'Academic Status > Teaching Relief Child Rearing', and 'Academic Status > Teaching Relief for Learning'. A search bar is located at the bottom of the screen.



# 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

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 email 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 Academic HR Support Specialist 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 data clean-up



# Workday Academic Reporting

Frequency	Report Name	Who should run
Monthly	My Business Processes in Flight – Yale	Any initiator
Monthly	Payroll Results Comparison – Yale	Business Partner
Monthly	Academic - Expiring Current 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 - Degrees – Yale	A&P Specialist
Bi-annually, Each Term	Contingent Workers with Expiring Contracts - Yale	BP or A&P Specialist
Annually, in Spring	Academic - Employees on Leave, by Academic Unit	A&P Specialist
Annually, in Spring	Academic - Ladder Faculty Review – Yale	A&P Specialist
Annually, in Spring	Academic - Non-Ladder Faculty Review – Yale	A&P Specialist
Annual	Supervisory Organization Details - Yale	BP or A&P Specialist



# Workday data clean-up

*It's time for spring cleaning!!*

*Reference reporting presentation online at  
<https://facultyadmin.yale.edu/workday-reports-academics>*





Thank you!  
Be sure to take some time to  
go outside today!

