

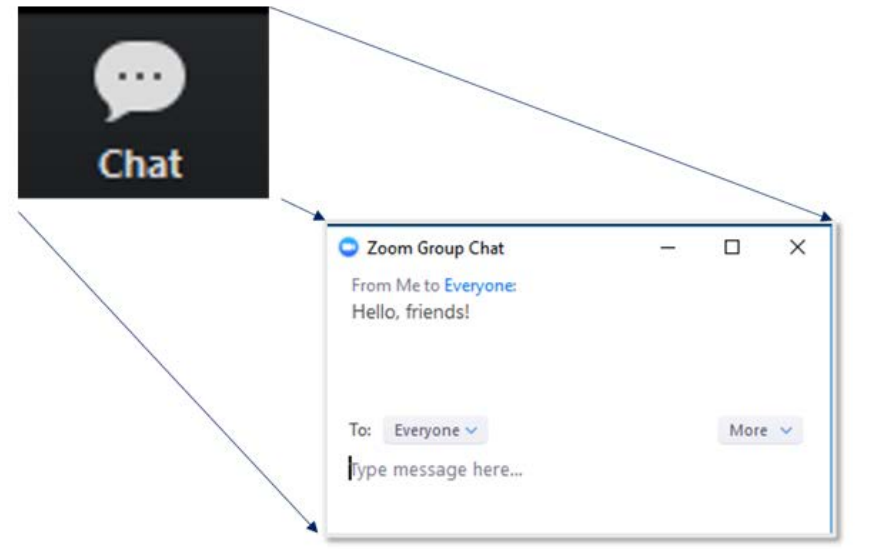
# Office of Faculty Administrative Services (OFAS)

Monthly Information Session  
April 12, 2019



# Welcome

- THIS SESSION IS BEING RECORDED
- Please make sure your phone or computer microphone is muted.
- Please enter any questions in the Chat window.
- If there are multiple people attending this session together, please enter their names in the Chat window. This enables us to follow-up with individuals if necessary.



# Agenda

## Reminders and Updates

---

### Off-boarding: Faculty departures

- Terminations, resignations, and retirement
  - Phased retirement and emeritus status
- 

### Onboarding: Faculty hires and rehires

---

### Topics for next session

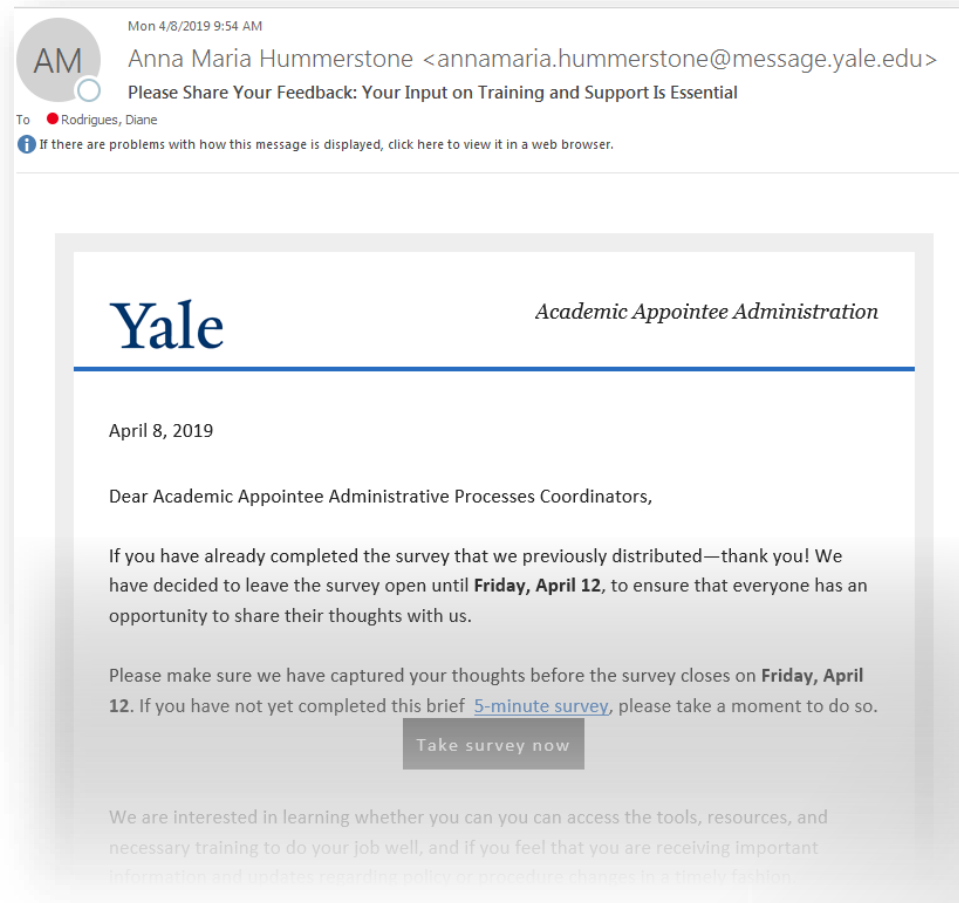
---

# Reminders and Updates

# Reminders and Updates

If you haven't already done so, please complete the survey from Anna Maria Hummerstone.

Your input will help us to improve the support and resources that we provide for you.



Mon 4/8/2019 9:54 AM

AM  
Anna Maria Hummerstone <annamaria.hummerstone@message.yale.edu>  
Please Share Your Feedback: Your Input on Training and Support Is Essential

To: ● Rodrigues, Diane  
If there are problems with how this message is displayed, click here to view it in a web browser.

---

**Yale** *Academic Appointee Administration*

---

April 8, 2019

Dear Academic Appointee Administrative Processes Coordinators,

If you have already completed the survey that we previously distributed—thank you! We have decided to leave the survey open until **Friday, April 12**, to ensure that everyone has an opportunity to share their thoughts with us.

Please make sure we have captured your thoughts before the survey closes on **Friday, April 12**. If you have not yet completed this brief [5-minute survey](#), please take a moment to do so.

[Take survey now](#)

We are interested in learning whether you can access the tools, resources, and necessary training to do your job well, and if you feel that you are receiving important information and updates regarding policy or procedure changes in a timely fashion.

# Reminders and Updates

June through September - Deadline for submitting materials for processing is 30 days in advance of effective date

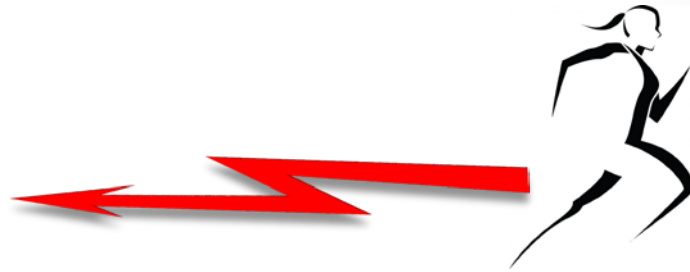
Example:

New Associate Research Scientist starting on July 15, 2018. Deadline for submitting supporting documentation to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) = June 15, 2018.



# Reminders and Updates

## Tips for faster approvals



All transactions require supporting documentation

- Refer to <http://facultyadmin.yale.edu/admin-processes>
- Submit all documents to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu)
- Format the subject line of the email as follows:
  - **Effective date, Faculty name, Transaction type**
    - E.g. 7/1/16 , Thomas Turbine, New Hire
- When entering the transaction in Workday, add the case number from the confirmation email to the Comments field



# Reminders and Updates

## Tips for faster approvals (con't)



- Submit documents well in advance of effective date
  
- Don't know how to enter the transaction in Workday?

*No worries!*

When submitting documents to OFAS, add a request for someone to contact you with instructions.



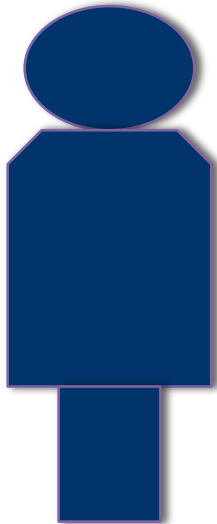


# Update

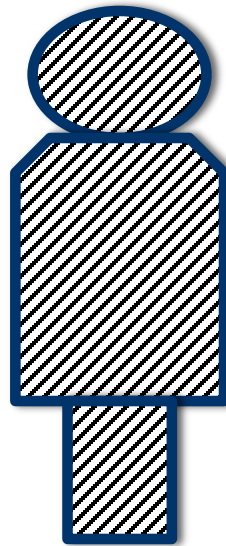
## Change to **Job Change** business process in Workday

### *Workday Review of Academic Appointee structure*

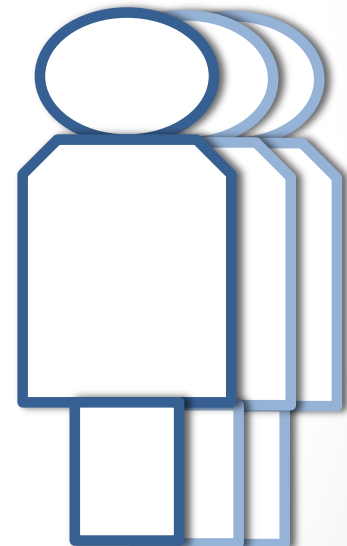
- An academic employee is **hired** into a single position in a Supervisory Organization
- An academic employee may have one or more Academic Appointments assigned/ managed by the respective Academic Units



- Job
- FTE
- Compensation
- Supervisory Org



- Job
- FTE
- Compensation
- Supervisory Org



- Rank
- Appointment Term
- Track Type
- Academic Unit

# Update

## Change to Job Change business process in Workday

Note: This only impacts the Employee record. There is no change to the business process to Update the Academic Appointee record.

- No longer need to create a new Job Requisition for changes in track or changes in Employee Type
- New Job Requisition not needed for changing departments, but may be desirable if changing Position Restrictions
  - Consult with Business Partner/Operations Manager or OFAS

Note: If transferring the position with the faculty member to a new supervisory org, choose the option to “Move this headcount to the new manager”

What do you want to do with the opening left on your team? \*

Move this headcount to the new ... ▾

select one

I plan to backfill this headcount

Move this headcount to the new manager

Close this headcount

# Off-boarding: Faculty departures

# Off-boarding: Faculty departures

## *Terminations, resignations, and retirement*

Run Workday report, “*Academic QA - Expired Current Appointments – Yale*”

- Appointment Expires On or After = 7/1/2015
- Appointment Expires On or Before = 3/31/2019
- Non-YSM **total expired** appointments = **323**
- **Oldest** expired appointments ended **12/31/2016**
- Faculty with appointments that expired more than 12 months ago need to be terminated if no plan to reappoint



# Off-boarding: Faculty departures

## *Terminations, resignations, and retirement*

### Resignation or retirement letter

- Required if leaving before current appointment end date or tenured appointment
- Not required if leaving on current appointment end date
- Non-ladder faculty retirement
  - Benefits Office will determine eligibility for retiree benefits upon request from faculty member
  - If eligible for retiree benefits, terminate in Workday with reason as “Retirement”
  - Can only be rehired after termination is approved and benefits applied



# Off-boarding: Faculty departures

## *Phased Retirement for Ladder Faculty*

- Faculty who wish to enroll in the [Phased Retirement Program](#), meet with a counselor in Benefits.
- A copy of the signed contract is sent to the School Dean or Department chair, Provost's Office, and OFAS.
- Provost's Office and OFAS enter changes to the faculty record in Workday.



# Off-boarding: Faculty departures

## *Emeritus status for ladder faculty*

- OFAS enters move to emeritus status for eligible ladder faculty who retire, including faculty in Phased Retirement Program.
- Emeriti remain active in Workday.




Be sure to obtain retirement letter from faculty member with intended date.

# Off-boarding: Faculty departures

## *Terminating in Workday*

- Refer to Workday training guide, “[Termination/Separation: Employee \(Academic\)](#)”
- “Terminate Employee” business process will prompt to end the academic appointment(s)
  - If faculty member has appointments in other departments, notify those departments of the departure
- Termination Date = Last Day of Work/Appointment End Date
- If you receive a **Red Error**, contact OFAS for assistance
- Close the position



The screenshot shows a 'Position Details' form in Workday. The form has a light blue header with the title 'Position Details'. Below the header, there is a section titled 'Close Position' with a blue checkmark in a box. To the right of this section are two buttons: a back arrow and a checkmark. Below the 'Close Position' section, there is a question 'Is this position available for overlap?' with an unchecked checkbox.



# Off-boarding: Faculty departures

Visit OFAS website for checklist:

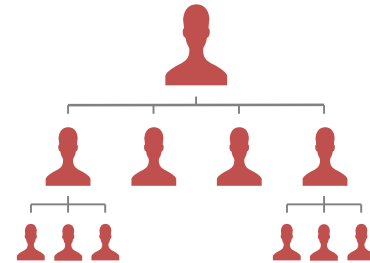
<https://facultyadmin.yale.edu/boarding-procedures-faculty-departures>

- [3503 FR.03 Termination Checklist](#)

---

NOTE: Faculty with Supervisory Organizations (SO)

- Members of these orgs must be moved or terminated.
- Positions and Requisitions on the Staffing tab need to be closed.
- Send email to Employee Services to close the SO.



# Onboarding: Faculty hires and rehires

# Onboarding: Faculty hires and rehires

Review documents on OFAS website at

<https://facultyadmin.yale.edu/onboarding-procedures-faculty-arrivals>

- New Faculty Checklist
  - Data Collection Form (Personal Data)
- Template email for new faculty
- International Faculty Onboarding list
- Transfer-in Checklist

*Welcome*

A decorative flourish consisting of symmetrical, ornate scrollwork and floral motifs, positioned below the word 'Welcome'.

# Onboarding: Faculty hires and rehires

## *Rehires and reappointments with break in service*

- Consider modifying and sending to rehires the template email for new faculty
- If applicable, remind them to re-enroll in benefits
- Encourage enrollment in retirement plan, if interested
  - All are eligible regardless of benefit eligibility
  - Faculty who are not eligible for benefits will not receive matching contributions from Yale
- Check I-9 status



# Topics for next session

- Parker Emerson, Office of International Students and Scholars (OISS)
- Summer compensation procedures