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.
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.
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 = 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

• 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
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”
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
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
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