

Office of Faculty Administrative Services (OFAS)

Information Session

April 20, 2021



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

Get ready to run!



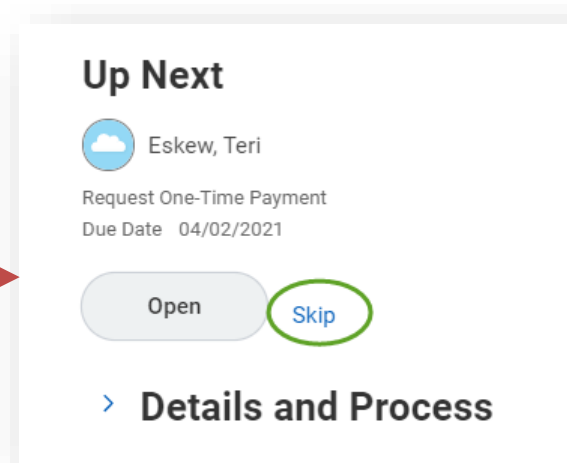
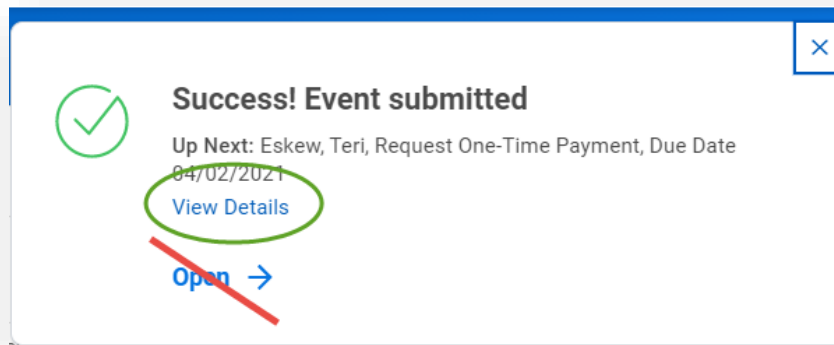
Reminders and Updates

Reminders and Updates

WORKDAY ALERT: During the Hiring process in Workday...

The recent update to Workday has changed the process when having to Skip one-time payments in Workday.

- Refer to memo from Anna Maria Hummerstone sent on April 6, 2021
- Hiring guide will need to be updated



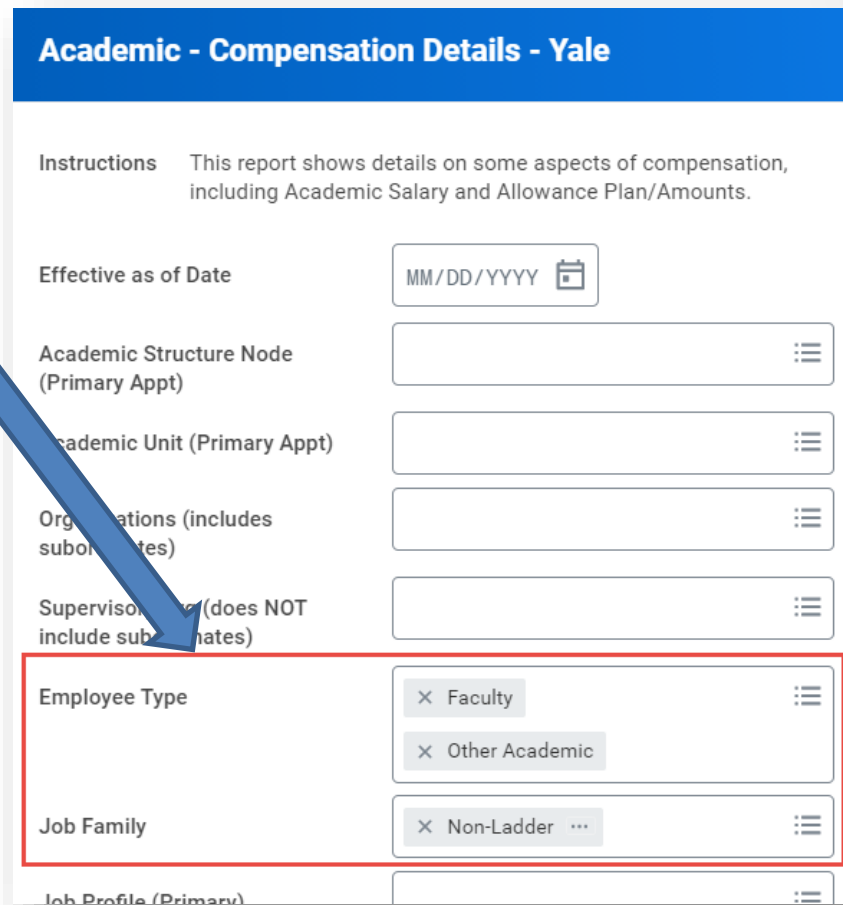
Reminders and Updates

COMPENSATION ALERT: Compensation without Actual End Dates may cause unintended future payments.

Recommendation:


1. Run the Workday report *Academic - Compensation Details – Yale* using the parameters as shown in the image. Download the results into Excel and filter for following:


- ✓ DPP < 12 months
- ✓ Total Academic Salary > 0
- ✓ *Salary Plan Actual End Date = Blank*





Academic - Compensation Details - Yale


Instructions This report shows details on some aspects of compensation, including Academic Salary and Allowance Plan/Amounts.


Effective as of Date MM/DD/YYYY 


Academic Structure Node (Primary Appt) 


Academic Unit (Primary Appt) 

Organizations (includes subordinates) 

Supervisor (does NOT include subordinates) 

Employee Type 
X Faculty
X Other Academic

Job Family 
X Non-Ladder ...

Job Profile (Primary) 

Reminders and Updates

COMPENSATION ALERT (con't): Compensation without Actual End Dates may cause unintended future payments.

2. Submit Request Compensation Change to enter Actual End Dates
 - Use Effective Date prior to the Actual End Date.
3. Send a single email to faculty.admin@yale.edu with a list of faculty who have changes to be approved.

Salary

Assignment Details ✕ ✎
45,045.05 USD Annual (Prorated: 30,000.00)

Plan Name
Academic Salary

Effective Date
● 05/01/2021 was 08/01/2020

Additional Details

Expected End Date
MM/DD/YYYY 📅

Actual End Date
05/31/2021 📅

Reminders and Updates

All *Overpayment Recovery Forms* and *Payroll Adjustment Forms* (on-demand payment requests) need to come to faculty.admin@yale.edu

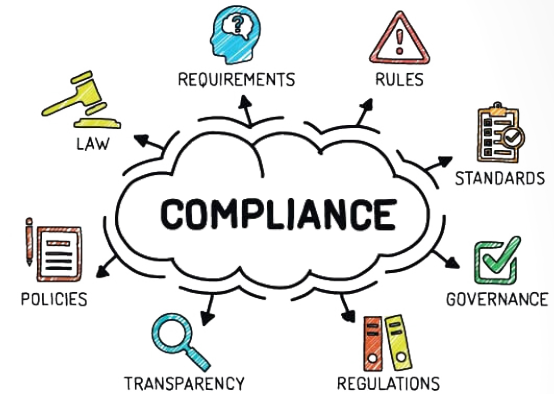


- *OFAS insures* that the record in Workday has been correctly adjusted
- *OFAS insures* that duplicate payments are not issued
- *OFAS coordinates* repayment schedules with Payroll

Reminders and Updates

Training requirements for all faculty

- State of Connecticut is mandating sexual harassment training
- All employees, including faculty, are required to take the training
- Once met, the training remains on their records, even if terminated and rehired



Emeritus faculty who are not being paid do not need to take the training.

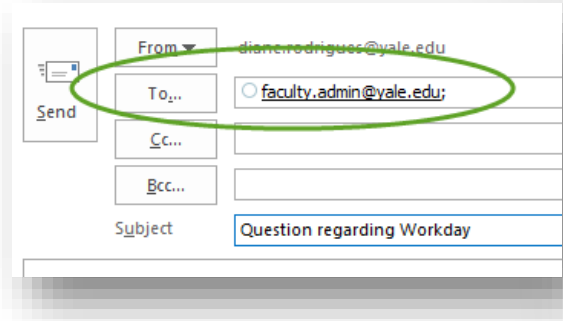
- Send email to OFAS and we will change them to “Unpaid” status to remove them from the list

Reminders and Updates

Please, please, please direct all questions and leave requests to faculty.admin@yale.edu instead of individual OFAS email.

Advantages:

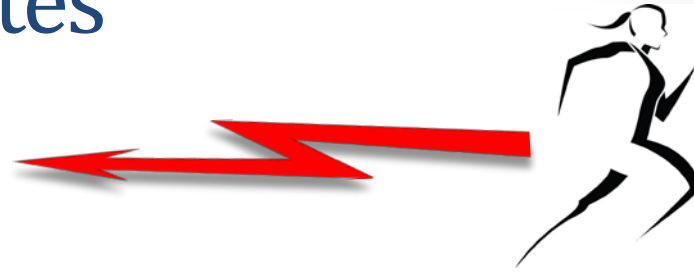
- Provides better tracking of issues
- Sends automated reminders to the OFAS case owner to follow up
- Allows easy sharing or reassigning of cases
- Insures continuous coverage



Note: Always include *the name of the faculty member* as well as any documentation when requesting guidance.

Reminders and Updates

Tips for faster approvals



All transactions require supporting documentation

- Refer to <http://facultyadmin.yale.edu/admin-processes>
- Combine all required documents into a single merged pdf
- Submit all documents to faculty.admin@yale.edu **before** entering the transaction in Workday
- Format the subject line of the email as follows:
 - **Effective date, Faculty name, Transaction type**
 - E.g. 7/1/21, Thomas Turbine, New Hire
- When entering the transaction in Workday, add the **case number** from the confirmation email in the Comments field

Reminders and Updates

Additional items of note:

- NetIDs are being issued **180 days** in advance of hiring date for *all* faculty and staff
- Email from **Salesforce** and **Interfolio** may land in your Junk box – please check often
- Changes to *Hiring and Contracting* guide will include
 - Instructions for adding the **Interfolio search ID**



Off-boarding: Faculty departures

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 and, if applicable, FAS 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 retirement date.

Note: All ladder appointments must end on either **June 30** or **December 31**.

Off-boarding: Faculty departures

Terminations, resignations, and retirement

Run Workday report, “*Academic - Expiring Appointments – Yale*”

- Appointment Expires On or After = 7/1/2015
 - Appointment Expires On or Before = 6/30/2021
- Faculty with appointments that expired more than 12 months ago need to be terminated if no plan to reappoint.
- Terminations that occur on Appointment End Date, use reason code, “Employment Period End – Term Ended.”



Primary Reason *

Search



× Employment Period Ended > Term Ended

Off-boarding: Faculty departures

Terminations, resignations, and retirement

Resignation or retirement letter

- Required if leaving before current appointment end date or tenured appointment
- All teaching faculty must be terminated on the LAST day of the month

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

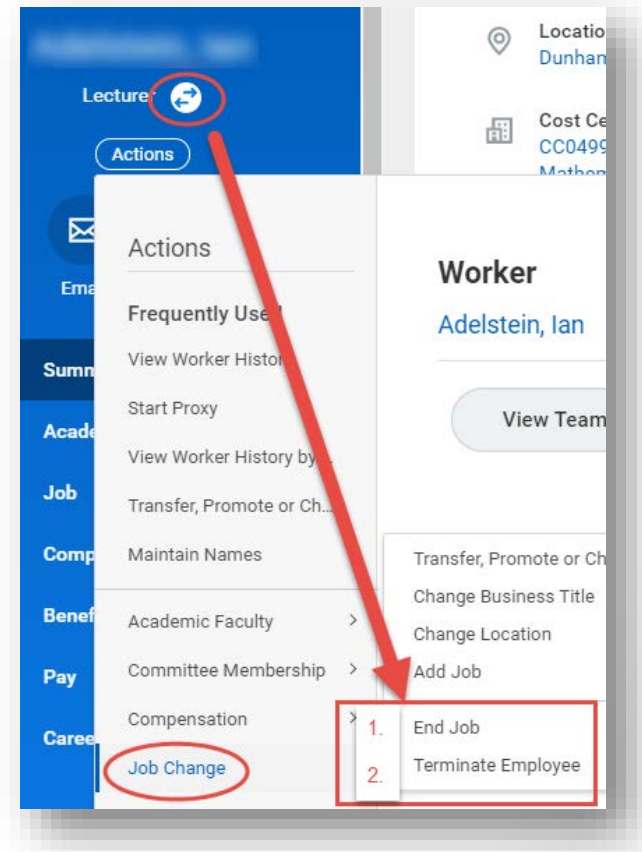
Off-boarding: Faculty departures

Terminating in Workday

Refer to Workday training guide,
[Termination/Separation: Employee \(Academic\)](#)

- If applicable, you must end the Summer Comp job using the same date as the termination date
- Terminate Employee business process will prompt to end the academic appointment
- Termination Date = Last Day of Work/Appointment End Date
- Note: All ladder and full-year teaching appointments must end on either **June 30** or **December 31**.

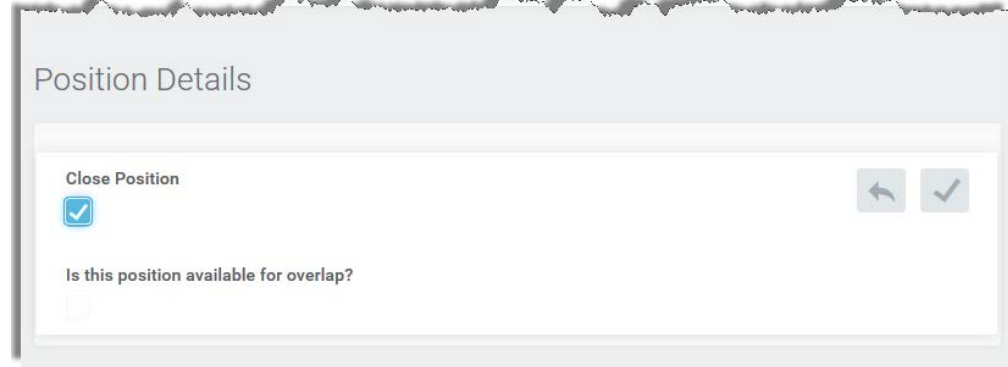
Circle with arrows indicates summer comp job



Off-boarding: Faculty departures

Terminating in Workday (con't)

- Alert secondary units to termination
- If you receive a **Red Error**, contact OFAS for assistance
 - There may be summer comp jobs in other units that need to be ended
- Close the position



The screenshot shows a 'Position Details' form in a light blue header. Below the header, there is a white box containing the 'Close Position' checkbox, which is checked with a blue checkmark. To the right of the checkbox are two small icons: a back arrow and a checkmark. Below the checkbox is the text 'Is this position available for overlap?' followed by an unchecked checkbox.

Note: NEVER simply end the primary appointment. This will only cause the faculty member to no longer appear on any academic reports.

Off-boarding: Faculty departures

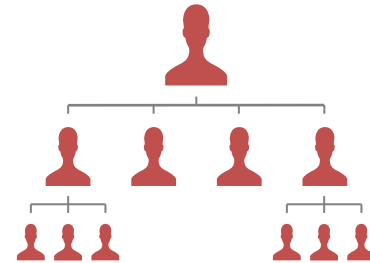
Visit OFAS website for checklist:

<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

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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, and possibly reappointed faculty, 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





PHEW!

Questions??