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
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.
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
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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.”
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**.
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

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

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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
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
Questions??