

Office of Faculty Administrative Services (OFAS)

Monthly Information Session

April 27, 2018

Reminders and Updates

Paying faculty in the summer

Onboarding: Faculty hires and rehires

Off-boarding: Faculty departures

- Phased retirement and emeritus status
 - Terminations, resignations, and retirement
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Topics for next session

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

E.g. New Associate Research Scientist starting on July 15, 2018. Deadline for submitting supporting documentation to faculty.admin@yale.edu = June 15, 2018.



Tips for faster approvals

All transactions require supporting documentation.

Refer to <http://facultyadmin.yale.edu/admin-processes>.

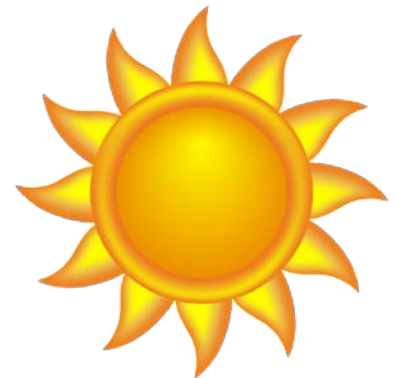
- Gather all of the necessary documents as stated on the Chart and submit to OFAS after submitting the transaction in Workday.
- Please DO NOT SUBMIT in Workday unless you have all of the documents.
- Format the subject line of the email as follows:
 - **Faculty name, transaction type, effective date**
 - E.g. Thomas Turbine, New Hire, 7/1/16

OFAS website - Under construction

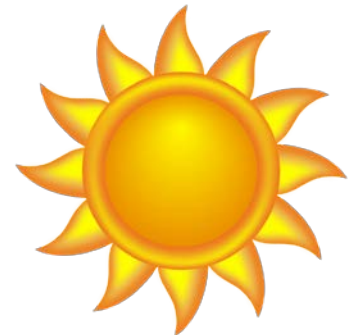
- Roll out – May 10, 2018
- Please send feedback using the Contact Us page.



Paying faculty in the summer



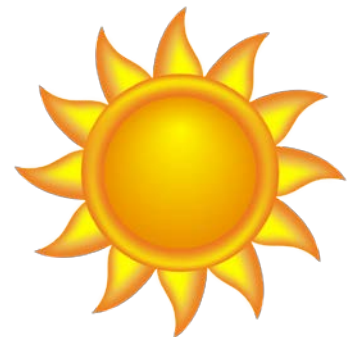
- Teaching/Instructional faculty who work in the summer are all paid with summer compensation, not regular comp
- Full-time, full year faculty must be given a Summer Compensation job
- Active faculty who are between appointments must be given a Teacher Summer Programs job
- These jobs are added using *Add Additional Job* in Workday



- Summer Compensation is entered in Workday using *Manage Period Activity Pay Assignments*
- Instructions for creating these jobs and paying summer compensation in Workday are online at <https://facultyadmin.yale.edu/summer-compensation-instructions> .

These procedures will be moved to the Workday @ Yale Training site.

Note: Specific details about the summer compensation procedures will be provided at the May information session.



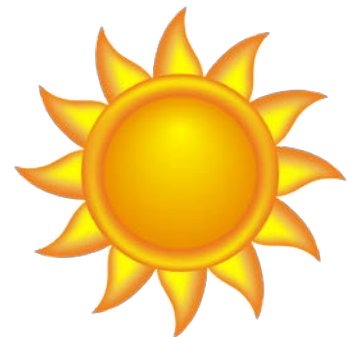
Summer Session teaching

Faculty teaching in the Summer Session will be handled by the Summer Session Office. That is...

- Summer Session will add the appropriate job, Summer Compensation or Teacher Summer Programs, depending on the faculty member's appointment.
- Summer compensation will be entered by the Summer Session Office.

Faculty who are terminating will need to be transferred to Summer Session.

- Instructions for transfer are on the Workday @ Yale Training site at <https://workday.training.yale.edu/training-materials/transferring-faculty-summer-session>



Onboarding: Faculty Hires and Rehires

Welcome



Review documents on OFAS website at <http://facultyadmin.yale.edu/onboarding-procedures-faculty-arrivals>

- New Faculty Checklist
 - Faculty Data Collection Form
- Template Welcome Email
- International Faculty Onboarding list
- Transfer-in Checklist



Rehires and reappointments with break in service

- Send template welcome email
- If applicable, remind them to re-enroll in benefits, especially retirement plan
- Check I-9 status



Off-boarding:
Faculty departures

Phased Retirement

- Faculty who wish to enroll in the Phased Retirement Program, meet with a representative in Benefits.
- A copy of the signed contract is sent to the Provost's Office and OFAS.
- Provost's Office and OFAS enter changes to the faculty record in Workday.



Emeritus status

- Upon completion of phased program, OFAS converts faculty member to emeritus status.
- OFAS also handles move to emeritus status for eligible ladder faculty who retire.
- Emeriti remain active in Workday.



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

Terminations, resignations, and retirement

- Resignation or retirement letter
 - Required if leaving before current appointment end date in Workday or tenured appointment.
 - Not required if leaving on current appointment end date.
- Non-ladder faculty retirement
 - Must be terminated in Workday.
 - Benefits Office will determine eligibility for retiree benefits and make the necessary changes to the record.
 - Can only be rehired after termination is approved and benefits applied.



Terminating in Workday

- Use the “Terminate Employee” business process. You will receive a To Do to end the academic appointment(s).
 - If the faculty member has appointments in other departments, notify those departments of the departure.
- Termination Date = Last Day of Work
- If you receive an error, contact OFAS. There may be a process that is blocking.
- Always close the position.



Visit OFAS website for checklist:

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

- [Termination and Transfer Checklist 3501 FR.31](#)

- Summer Compensation Procedures
- I-9 process
- Workday reports and frequencies