

**Office of Faculty Administrative  
Services (OFAS)**

**Information Session**

**May 1, 2017**

- **Transition to Workday Financials**
- **Summer Compensation**
  - Update for this year
  - Policies and Procedures
  - Teacher Summer Programs
- **End of term activities**

## Transition to Workday Financials

## **Ah Change...**

Change is inevitable. Change is constant.

*-Benjamin Disraeli*

The price of doing the same old thing is far higher than the price of change. *-Bill Clinton*

If we don't change, we don't grow. If we don't grow, we aren't really living. *-Gail Sheehy*

When you're finished changing, you're finished. *-Benjamin Franklin*

If you don't like something, change it. If you can't change it, change your attitude. *-Maya Angelou*

Important change that will impact academic business processes for all schools.

- Today through June 2017 - Labor schedules are entered into Oracle, in most cases this is done by OFAS staff.
- July 2017 - Costing allocations will be entered into Workday by department staff.
- New Workday roles have been created to enter or change costing.
  - Cost Center Payroll Costing Specialist
  - Cost Center Payroll Accounting Adjustment Specialist
- Some academic business processes in Workday allow for entry of charging, such as one-time payments.

This change will specifically impact compensation transactions related to academic business processes for all schools.

- [Calendar of Changes for Summer 2017](#) – Posted on OFAS website on [Administrative Processes](#) page.

## Highlights of the Calendar of Changes

- **6/7/17 - Deadline to submit Charging Instructions form with PTAE0 in order to be converted to Workday**
- **Complete packets with Charging Instructions submitted by 6/7/17 will be entered into Oracle.**
  - New hire exception for faculty being hired on 9/1/17 or later - They will not backbridge to Oracle so charging cannot be entered in time for conversion.
- **Supporting documents submitted post 6/7/17 and new hires with a start date of 9/1/17 or later**
  - No longer need Charging Instructions with PTAE0
  - New form – Faculty Compensation Approval

## Update on Summer Compensation



## June 2017

- ✓ Can be entered in Workday now
- ✓ Use the June 2017 form available on PPDEV
  - <https://your.yale.edu/policies-procedures/forms>
- ✓ No multi-month period in Workday



## COORDINATE!

If you're paying another department's faculty, let the home department know



## APPROVE!

- ✓ Form needs to be signed by the business administrator responsible for the funding source
- ✓ Transactions need to be ready for approval in my Workday Inbox



## BACK-UP!

If the funding source is non-grant, include back-up



## SEND!

Send forms to [provostforms@yale.edu](mailto:provostforms@yale.edu) – please no cc!

July and August 2017



[Workday@Yale](#)

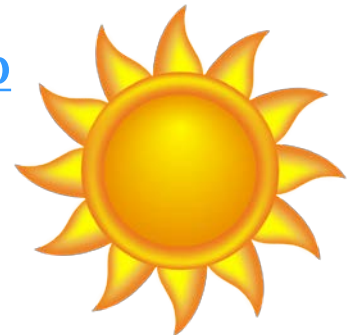
## Policies

- [Faculty Handbook](#)
  - XVIII. Faculty Compensation, Benefits, and Services, section B
- Can only be paid to teaching faculty (9 month) with multi-year or continuous full-year appointments
- Maximum monthly – 1/9 of academic year salary
- Maximum time – 2-1/2 months
- Faculty may not accept other employment during any month in the summer when also receiving full-time Yale salary



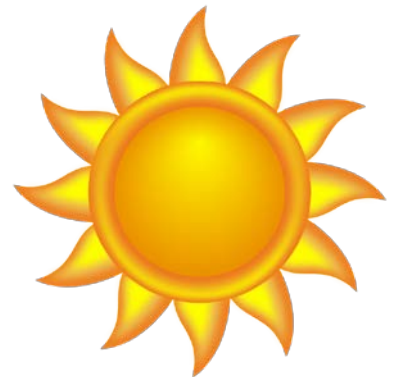
## Procedure

- **Complete the Faculty Summer Compensation Form.**
  - Available online at
    - Yale's Policies and Procedures page in the forms section, <http://policy.yale.edu/forms>
    - OFAS website, Administrative Processes, <http://facultyadmin.yale.edu/admin-processes>
- **Enter the transaction in Workday.**
  - Instructions on OFAS website, Administrative Processes, under Summer Compensation section, <http://facultyadmin.yale.edu/summer-compensation-job>
- **Send form to [provostforms@yale.edu](mailto:provostforms@yale.edu).**



## Workday mechanics

- In order to pay summer compensation to a faculty member, he or she must have a **Summer Compensation job** in Workday.
- Any department may create a Summer Compensation job for any faculty member. E.g. Summer Session creates Summer Comp jobs for faculty who teach in the summer programs.
- Faculty who received summer comp in your org last year should still have the Summer Comp job that was created.
- Compensation is entered using the Manage Period Activity Pay Assignments and must be entered on the Summer Comp position.

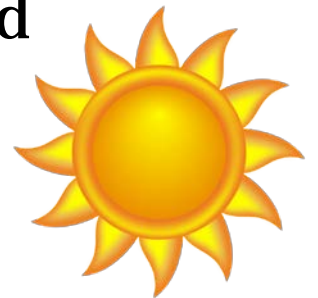


## Teacher Summer Programs

Faculty with single-term or single-year appointments who teach in Summer Session will be provided with an additional job as Teacher Summer Programs.

- They do not need to be transferred if there is a plan to reappoint them within your department.
- They will need to be transferred to Summer Session if they are resigning or being terminated.

Additionally, any faculty in this category whom you need to pay for work in the summer will need to be changed to the job profile of Teacher Summer Programs.



End of term activities



## Run Workday report: *Academic - Expiring Appointments – Yale*

- Use date range of 6/1/14 to 6/30/19 to capture all who expired and those who need to be reappointed.
- Review list with dean or chair and determine actions
  - Reappointments for short-term faculty
  - Reviews for multi-year faculty
  - Terminations
- Multi-year faculty in their penultimate (second to last) year, must be reviewed in the coming year

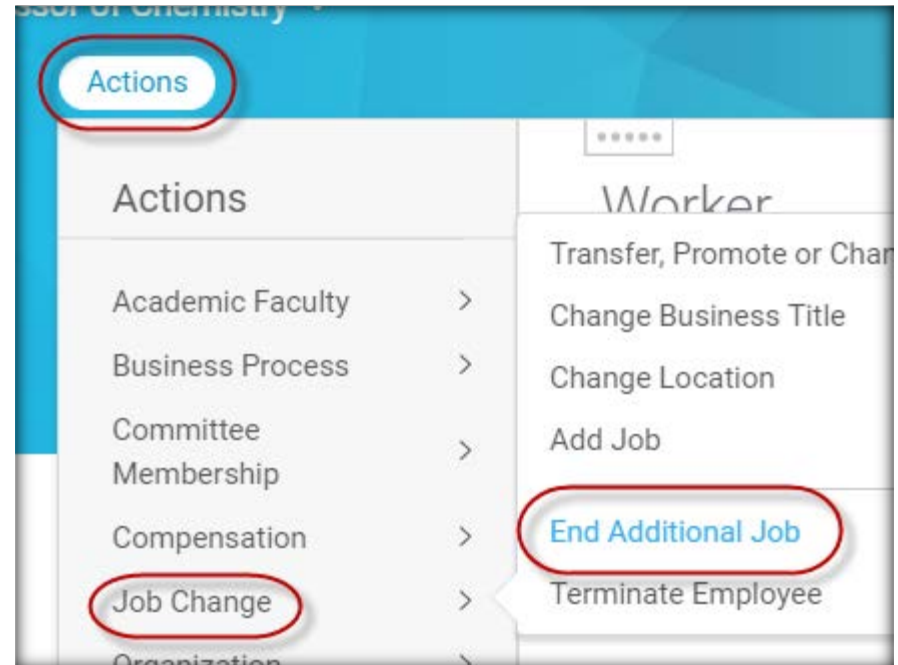
- **Terminations**

- Terminate faculty who are not returning.
- Termination date = Last day of appointment
- If terminating earlier than term end date or if tenured, obtain resignation in writing.
- Retirements – refer faculty to Employee Services to meet with a representative.



- **Terminations**

- Before terminating, you will need to end additional jobs.
- End the job on a date that is prior to the termination date, but not before the last payment on that job.
- If the additional job is not in your department, send email to OFAS (faculty.admin@yale.edu)



## Onboarding and offboarding

- Information online at <http://facultyadmin.yale.edu/resources>
  - Note: Send “Template welcome email” to faculty who have been re-hired or reappointed with benefits.
- Reviewed in depth at next information session