Office of Faculty Administrative Services (OFAS)

Information Session

May 10, 2019
Agenda

Parker Emerson, Office of International Students and Scholars

Summer Compensation
  - Policies and Procedures
  - Workday mechanics

Reminders and Tips
Summer Compensation
Summer Compensation - Policies

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
Summer Compensation - Procedures

CHANGES for the Summer 2019

• NONE!
Reminder on the Period Activity Pay screen

Select correct Activity. If you don't know if you're picking the right one, don't guess! Find out the answer before proceeding.

PAYMENT DATES ARE FOR SELECTING THE PAYROLL MONTH. ACTIVITY DATES ARE FOR THE MONTH THE WORK WAS/WILL BE DONE.

Payment Dates = Payroll Dates

Enter COA by clicking this button.
Please submit Summer Comp by the 15th of the month.

You can only pay on a summer comp job if the person has an active primary appointment in the teaching ranks for the period of work. Contact the home department if you don’t know.

Selecting the correct Activity is very important to the review process. Please don’t guess. Reviewers should double-check this.

You can add multiple activities to the same payment and each activity line can have multiple charging instructions.
Summer Compensation – Reminders (con’t)

- Summer compensation validation rounds down to the nearest penny, not up. *If you get an error message, try adjusting down one penny.*

- We’ll be processing in real time, so the sooner approved by business partner, the sooner we’ll be able to process the transaction.

- Workday only allows one BP “in progress” at a time, but as soon as the first one is complete, you can do the next one.
Summer Compensation – Reminders (con’t)

Summer Comp Back-up in Workday:

- Departments who have hired a faculty member for specific employment such as teaching a summer program, should issue and upload the letter engaging the faculty member for the summer work.
- This is different from the university salary or recruitment letter in which someone is hired to work for the university. We do not want these in Workday.
- Do not upload anything for Grants, including emails with faculty members. Departments are to keep that information locally, not in Workday.
- Do not upload university salary/recruitment/offer letters to support LSU ninths or any other arrangements. If it is a complicated arrangement, feel free to email supporting documentation to provostforms@yale.edu. If more is needed, we’ll contact you.
Summer Compensation – Workday mechanics

For assistance with Workday:

- Training Guide: *Instructions for Paying Summer Compensation in Workday* online at Workday @ Yale Training, (https://workday.training.yale.edu/training-materials/paying-summer-compensation-workday)

- Period Activity Pay needs to be paid using a Summer Compensation Position – different from the person’s regular position

- Any academic department can create a Summer Compensation Position for any faculty member in their Summer Compensation Supervisory Org

- DO NOT create another Summer Compensation job if one already exists
  - Faculty who received summer comp in your organization last year should still have the Summer Compensation job that was created
Summer Compensation – Workday mechanics

In the cases below, the Teacher Summer Programs job is used instead of a Summer Compensation job:

- Teaching faculty active during the spring term with no appointment in June, July, or August, and are being reappointed in August or September
- Teaching faculty with appointments expiring May 31 who were paid during the spring term
  - If they are being terminated, they must be transferred to Yale Summer Session
- Emeritus faculty
- Yale Summer Session instructors

- Any other summer hire should be handled under a separate HR process or paid as a vendor
Reminders and Updates
Reminder

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.
Reminder and Tip

- Submit documents to faculty.admin@yale.edu well in advance of effective date
- Combine all required documents into a single pdf – DO NOT SEND INCOMPLETE MATERIALS
- Format the subject line of the email as follows:
  - Effective date, Faculty name in **Workday**, Transaction type
    - E.g. 7/1/16, Tommy Turbine, New Hire

- 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.
Reminder and Tip

In Workday....

- Compensation Change is the last step in the Job Change business process – DO NOT LAUNCH A SEPARATE PROCESS

- WARNING regarding One-time Payment step in the Hire process – to avoid getting stuck
  - DO NOT click Save for Later at this step
  - Click SKIP if not sure
Reminder and Tip

Secondary appointments

- The end date cannot go beyond the primary appointment end date
- To determine the end date of the primary
  - Call or email the department of the primary appointment
  - Launch the Add Academic Appointment business process for the faculty member. The primary appointment will appear to the right in that window
Tip

Reappointment vs. Extension

- **Reappointment**
  - Start date is a date after the latest appointment end date

- **Extension**
  - Start date = same date as current appointment start date
  - End date is changed to newly approved ‘extended’ end date
  - Compensation typically does not change
  - Workday Reason Code = Extension
Have an awesome Summer!