

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
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Reminders and Tips

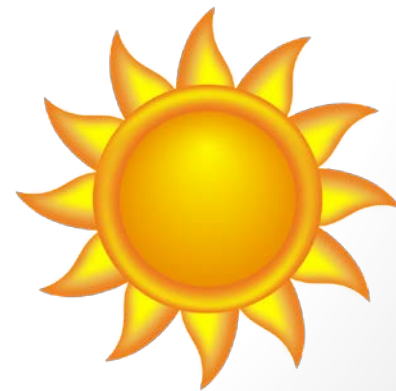
Summer Compensation

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!



Summer Compensation - Procedures

Reminder on the Period Activity Pay screen

The screenshot shows the 'Period Activity Pay' screen for 'Summer Compensation (June 2018)'. The interface is divided into several sections: 'Rate Matrix', 'Reason', 'Item', and a main data entry area. The main area is split into columns for '*Activity', '*Activity Dates', '*Units', '*Compensation', and 'Payments'. Annotations include:

- A red box at the top left says 'Add more activity lines as needed' with an arrow pointing to a plus sign icon.
- A green box says 'Select correct Activity. If you don't know if you're picking the right one, don't guess! Find out the answer before proceeding.' with an arrow pointing to the Activity dropdown.
- A red box at the top right says 'PAYMENT DATES ARE FOR SELECTING THE PAYROLL MONTH. ACTIVITY DATES ARE FOR THE MONTH THE WORK WAS/WILL BE DONE.' with an arrow pointing to the Start Date field in the Payments section.
- A blue box says 'Payment Dates = Payroll Dates' with an arrow pointing to the Start Date field in the Payments section.
- A yellow circle highlights a button with the number '0' in the *Compensation section, with a yellow box below it saying 'Enter COA by clicking this button'.

Rate Matrix: Yale Period Activity Pay
Reason: X Period Activity > New Assignment > Summer Compensation Assignment

*Activity	*Activity Dates	*Units	*Compensation	Payments
Activity *	Start Date *	Unit Type	Total Amount *	Start Date
Task	End Date *	Quantity *	Currency	End Date
Comment	Use as Payment Date Range	Default Quantity	Costing Overrides	Do Not Pay
		Assigned Unit Rate *		Number of Payments
		Default Unit Rate		Remaining Balance
				Paid to Date
				Currency

Summer Compensation - Reminders

- 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), (<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

Supporting Information

Current Appointments 3 items

Academic Unit	Track Type	Title	Start Date	End Date	Identifier
Classics	Non Ladder - Teaching >> Teaching	Lecturer	01/01/2019	06/30/2019	S - Secondary
English	Non Ladder - Teaching >> Teaching	Lecturer	07/01/2018	12/31/2018	P - Primary

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!

