Office of Faculty Administrative Services (OFAS)

Monthly Information Session

May 13, 2016
• Housekeeping and Updates

• Important tips for faster approvals in Workday

• Paying faculty in the summer
  • Summer Compensation
  • Teacher Summer Programs

• Onboarding new faculty hires

• Off-boarding departing faculty
This is the last information session for the academic year. We will resume again in the fall. In the meantime...

All presentations and instructional documents from these sessions are available on ClassesV2, https://classesv2.yale.edu/portal. We will send a notification when available on the OFAS website.

OFAS Training sessions
• Posted on TMS
• Workday – 3 different levels + weekly workshops
• Interfolio – promotion and tenure
Housekeeping and Updates

• Taxable Reimbursement 120 –
  • No longer routing to Faculty Affairs for approval.
  • Departments need to enter charging.

• Netids for faculty are now being generated 90 days in advance of the start date versus 65 days.
Important tips for faster approvals

All transactions require supporting documentation. Refer to Charts online at http://facultyadmin.yale.edu/admin-processes.

• Gather all of the necessary documents as stated on the Chart and submit to OFAS upon submission to Workday.

• Please DO NOT SUBMIT in Workday unless you have all of the documents.

• Secondary appointments – You need an email or letter of approval from the FAS department chair or authorized school dean.

• Format the subject line of the email as follows:
  – **Faculty name, transaction type, effective date**
    • E.g. Thomas Turbine, New Hire, 7/1/16
• Full-time, full year faculty are paid using Summer Compensation

• Faculty who are between appointments must be hired as or converted to the job profile of Teacher Summer Programs

• In both cases, faculty are paid in Workday using Manage Period Activity Pay Assignments

• Procedures are on the OFAS website and online at http://facultyadmin.yale.edu/admin-processes
Paying faculty in the summer

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.
Onboarding new faculty hires

Review documents on OFAS website at [http://facultyadmin.yale.edu/onboarding-procedures-faculty-arrivals](http://facultyadmin.yale.edu/onboarding-procedures-faculty-arrivals)

• New Faculty Checklist
• Faculty Data Collection Form, part 2
• Template Welcome Email
• International Faculty Onboarding list
• Transfer-in Checklist
Off-boarding departing faculty

Review information on OFAS website at http://facultyadmin.yale.edu/boarding-procedures-faculty-departures

- Departures include term ending with no reappointment, resignation, retirement, and the death of a faculty member. Note: Emeritus faculty always remain active.

- Termination and Transfer Checklist 3501 FR.31
Off-boarding departing faculty

Terminating faculty in Workday

• Need resignation letter if leaving before original end date.

• Begin by using the “Terminate Employee” business process. Once approved, 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.

• The 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.
Open discussion

• Questions?

• Topics for future sessions

• Questions, feedback, or suggestions for future meeting topics are always welcome
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