

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



- **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.**

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>

Faculty Administrative Services

Home Searches Reappointments & Promotions Leaves Resources Ca

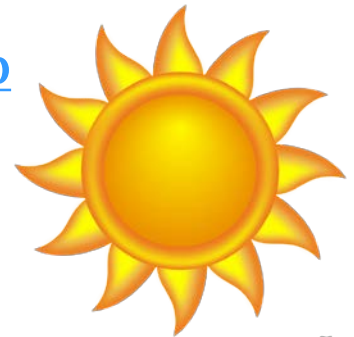
Home » Resources » Faculty forms and their uses

Administrative Processes

On July 1, 2015, Workday became our system of record for human resources and payroll appointment and compensation information. In place of entering faculty appointment and compensation information into forms, the information is now entered into the Workday system. For more information, visit the Faculty Administrative Services website.

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.**



Review documents on OFAS website at <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

Welcome

A decorative flourish consisting of a series of interconnected, symmetrical scroll-like patterns in a golden-brown color, positioned below the word 'Welcome'.

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



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.



The screenshot shows a 'Position Details' form in a light blue header. Below the header, there is a white form area. The first section is labeled 'Close Position' and contains a checked checkbox. To the right of this section are two buttons: a back arrow and a checkmark. Below this is another section labeled 'Is this position available for overlap?' with an unchecked checkbox.

- Questions?
- Topics for future sessions
- Questions, feedback, or suggestions for future meeting topics are always welcome
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