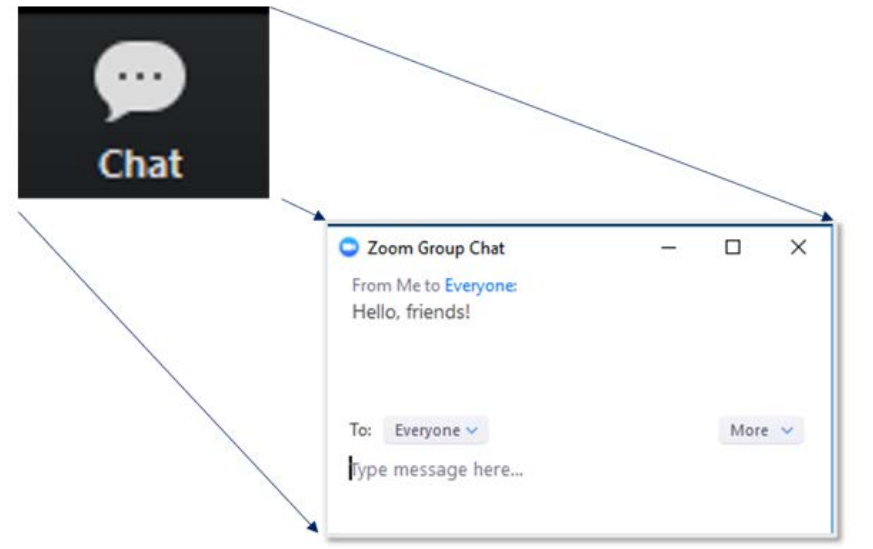# Welcome

- THIS SESSION IS BEING RECORDED
- Please make sure your phone or computer microphone is muted.
- Please enter any questions in the Chat window.
- If there are multiple people attending this session together, please enter their names in the Chat window. This enables us to follow-up with individuals if necessary.



1

# Office of Faculty Administrative Services (OFAS)

# Information Session

## May 22, 2020

# Agenda

Summer Compensation

- Policies and Procedures
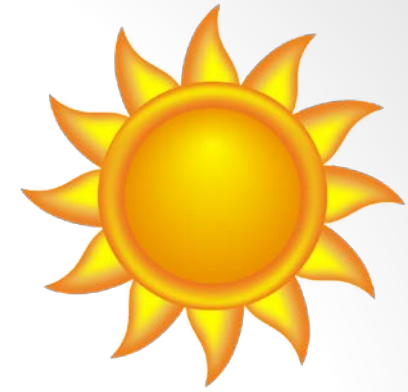- Workday mechanics

Reminders and Tips

Off-boarding: Faculty departures

- Terminations, resignations, and retirement
- Phased retirement and emeritus status

Onboarding: Faculty hires and rehires

# Summer Compensation

# Summer Compensation Policies

See the *[Faculty Handbook](#)*

- XVIII. Faculty Compensation, Benefits, and Services, section B

- Summer Comp can only be paid to teaching faculty (9 month AWP) with multi-year or continuous full-year appointments

- 12-month faculty (12 Month AWP) are not eligible for summer compensation

- Maximum amount each month is 1/9 of academic year salary

- Cap on Summer Months is 2-1/2 months each summer

- Faculty may <u>not</u> accept other employment during any month in the summer when also receiving full-time Yale salary

# Summer Compensation Deadlines

- CHANGES for Summer 2020

  - Please submit forms by the 1st of the month.

  - We cannot guarantee that anything submitted after the 10th will be processed for that month's payroll.

| | | | June | | | |
|---|---|---|---|---|---|---|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | | | | |

| | | | July | | | |
|---|---|---|---|---|---|---|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

| | | | August | | | |
|---|---|---|---|---|---|---|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

# Reminders for the Period Activity Pay screen

Academic Period ★ Summer Compensation (June 2018)

Rate Matrix    Yale Period Activity Pay

Reason ★     X Period Activity > New
             Assignment > Summer
             Compensation Assignment

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

1 item

Add more activity lines as needed

| *Activity | *Activity Dates | *Units | *Compensation | Payments |
|---|---|---|---|---|
| Activity ★ | Start Date ★ | Unit Type | Total Amount ★ | Start Date |
| | MM / DD / YYYY | | 0.00 | MM / DD / YYYY |
| Task | | Quantity ★ | Currency | End Date |
| | End Date ★ | 0 | USD | MM / DD / YYYY |
| | MM / DD / YYYY | Default Quantity | | |
| Comment | | 0 | Costing Overrides | Do Not Pay |
| | Use as Payment Date Range | Assigned Unit Rate ★ | 0 | Number of Payments |
| | | 0.00 | | 0 |
| | | Default Unit Rate | | Remaining Balance |
| | | | | 0.00 |
| | | | | Paid to Date |
| | | | | 0 |
| | | | | Currency |

Use this to comment on the transaction—this is necessary when a GIFT is used or when the transaction is REPLACING a completed transaction. If a gift, include GS or GE number and explain the pre-approval for this.
For REPLACING or ADDING to a completed BP, please indicate what you're doing such as: "Addition to June payment on 7/12/20. Adding $4000 charged to GR###" or "Replacing July summer comp with split charging and increased amounts". This helps us distinguish between the old and new transactions.

Enter COA by clicking this button

7

# Reminders

➢ You can only pay on a summer comp job if the person has an active primary appointment in the teaching ranks during 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 Business Process (BP) and each activity line can have multiple charging instructions.

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

➢ 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. You don't have to wait until the new month, you just have to wait until the first BP is done.

# Reminders on Summer Comp Positions

➢ Any academic department can create a Summer Compensation position for any faculty member in their "Summer Compensation" Supervisory Org.

➢ Period Activity Pay needs to be paid using a Summer Compensation Position—this is different from the person's regular position.

➢ New faculty will need to have a Summer Compensation position created before you can process a summer comp payment.

➢ For new Summer Compensation positions, Workday will default in with the current date as the effective date of the new position. This needs to be changed to the first day of the "Activity" period you'll be paying or you'll get an error message.

➢ DO NOT create another Summer Compensation position in your department for someone if one already exists.

For assistance with Workday, see the 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)

# Teacher Summer Programs Job

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

- 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
  - Note: 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

# Summer Compensation Documentation

➢ Departments who have hired a faculty member for specific employment, such as teaching a summer program, should <u>issue and upload</u> into Workday the letter engaging the faculty member for the summer work.

➢ This is different from the university appointment letter in which someone is hired to work for the University. <u>We do not want these in Workday.</u>

➢ <u>Do not</u> upload back-up for Grants. This includes emails with faculty members. Departments are to keep that information locally, not in Workday.

➢ Do not upload university salary/appointment/offer letters to support LSU ninths or any other arrangements. Use the comment box to describe the situation, if necessary.

➢ If you have a complicated arrangement, email supporting documentation to [provostforms@yale.edu](mailto:provostforms@yale.edu). If more is needed, we'll contact you.

# Questions?

# Reminders and Updates

# Reminder

June through September - Deadline for submitting materials for processing is 30 days in advance of effective date
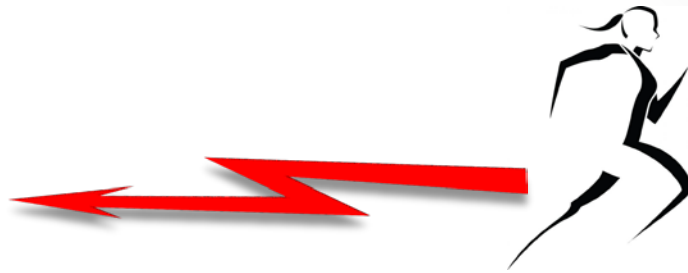
Example:

New Associate Research Scientist starting on July 15, 2020.  Deadline for submitting supporting documentation to faculty.admin@yale.edu = June 15, 2020.

# Reminders and Updates

*<u>Tips for faster approvals</u>*

<u>All</u> transactions require supporting documentation

- Refer to *[http://facultyadmin.yale.edu/admin-processes](http://facultyadmin.yale.edu/admin-processes)*

- Combine all required documents into a single pdf

- Submit all documents to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) before entering the transaction in Workday

- Format the subject line of the email as follows:
  - **Effective date, Faculty name, Transaction type**
    - E.g. 7/1/16 , Thomas Turbine, New Hire

- When entering the transaction in Workday, add the case number from the confirmation email to the Comments field

# Reminders and Updates

*Tips for faster approvals (con't)*

➢ Always send questions to [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) and NOT to individuals in OFAS

➢ 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...

If you haven't hired new faculty recently or often, follow the guide on the Workday @ Yale training site, *Hire Faculty Process*.

The guide provides a list of common areas where problems often occur.

## CAUTIONARY ADVICE – READ CAREFULLY

- Pre-Hire: If you think you created a pre-hire, do not create another. If you cannot find the pre-hire in the Existing Pre-hire search, reach out to the appropriate contact in the footer.
- Supervisory Org: Be sure to select the correct supervisory org when creating the job req. This cannot be corrected during the hire process.
- Recruiting Start Date: Do not enter a future date. Otherwise, the req will not be available for use until that date.
- Address: You must enter an address in the US and it must be coded as the Home address.
- Compensation: If the faculty member is part time (FTE < 50%), the Prorated Amount must match the amount to be paid. The Annual needs to be the full-time amount.
- One-time payment: Click Skip if you're not sure. Otherwise, you may get stuck in this stage.

The fastest way to get to the Workday @ Yale training site is from within Workday. Under your profile in the upper-right corner, select the *Help* option on the Home menu.

# 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

NOTE: Extensions for tenure-track faculty due to COVID-19 will be handled centrally.

# Off-boarding: Faculty departures

# Off-boarding: Faculty departures

> *Terminations, resignations, and retirement*

## Resignation or retirement letter

- <u>Required</u> if leaving before current appointment end date or tenured appointment


- Non-ladder faculty retirement

  - Benefits Office will determine eligibility for retiree benefits upon request from faculty member

  - If eligible for retiree benefits, terminate in Workday with reason as "Retirement"

  - Can only be rehired after termination is approved and benefits applied

# Off-boarding: Faculty departures



*Phased Retirement for Ladder Faculty*

- Faculty who wish to enroll in the [Phased Retirement Program](#), meet with a counselor in Benefits.

- A copy of the signed contract is sent to the School Dean or Department chair, Provost's Office, and OFAS.

- Provost's Office and OFAS enter changes to the faculty record in Workday.

# Off-boarding: Faculty departures

## *Emeritus status for ladder faculty*

- OFAS enters move to emeritus status for eligible ladder faculty who retire, including faculty in Phased Retirement Program.
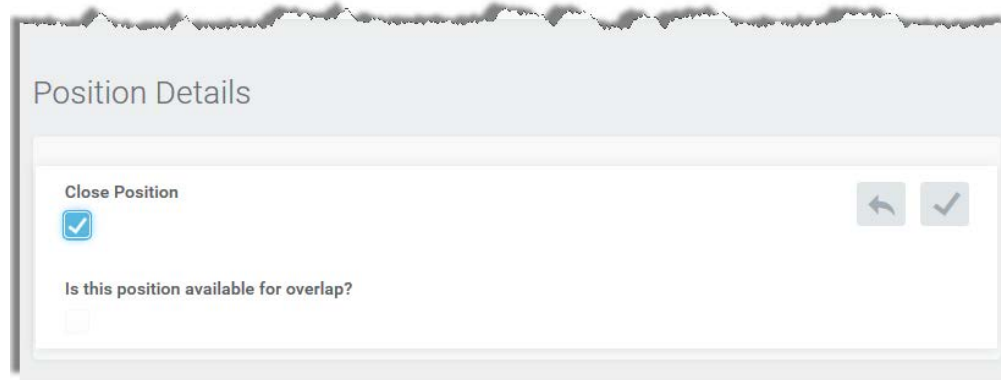
- Emeriti remain active in Workday.

Be sure to obtain retirement letter from faculty member with intended date.

# Off-boarding: Faculty departures

*Terminating in Workday*

- Refer to Workday training guide, "[Termination/Separation: Employee (Academic)](#)"

- "Terminate Employee" business process will prompt to end the academic appointment(s)

- Termination Date = Last Day of Work/Appointment End Date

- If you receive a <span style="color:red">Red Error</span>, contact OFAS for assistance

- Close the position

# Onboarding:
# Faculty hires and rehires

# Onboarding: Faculty hires and rehires

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

- New Faculty Checklist
  - Data Collection Form (Personal Data)
- Template email for new faculty
- International Faculty Onboarding list
- Transfer-in Checklist

# *Thanks for Zoom-ing in!*