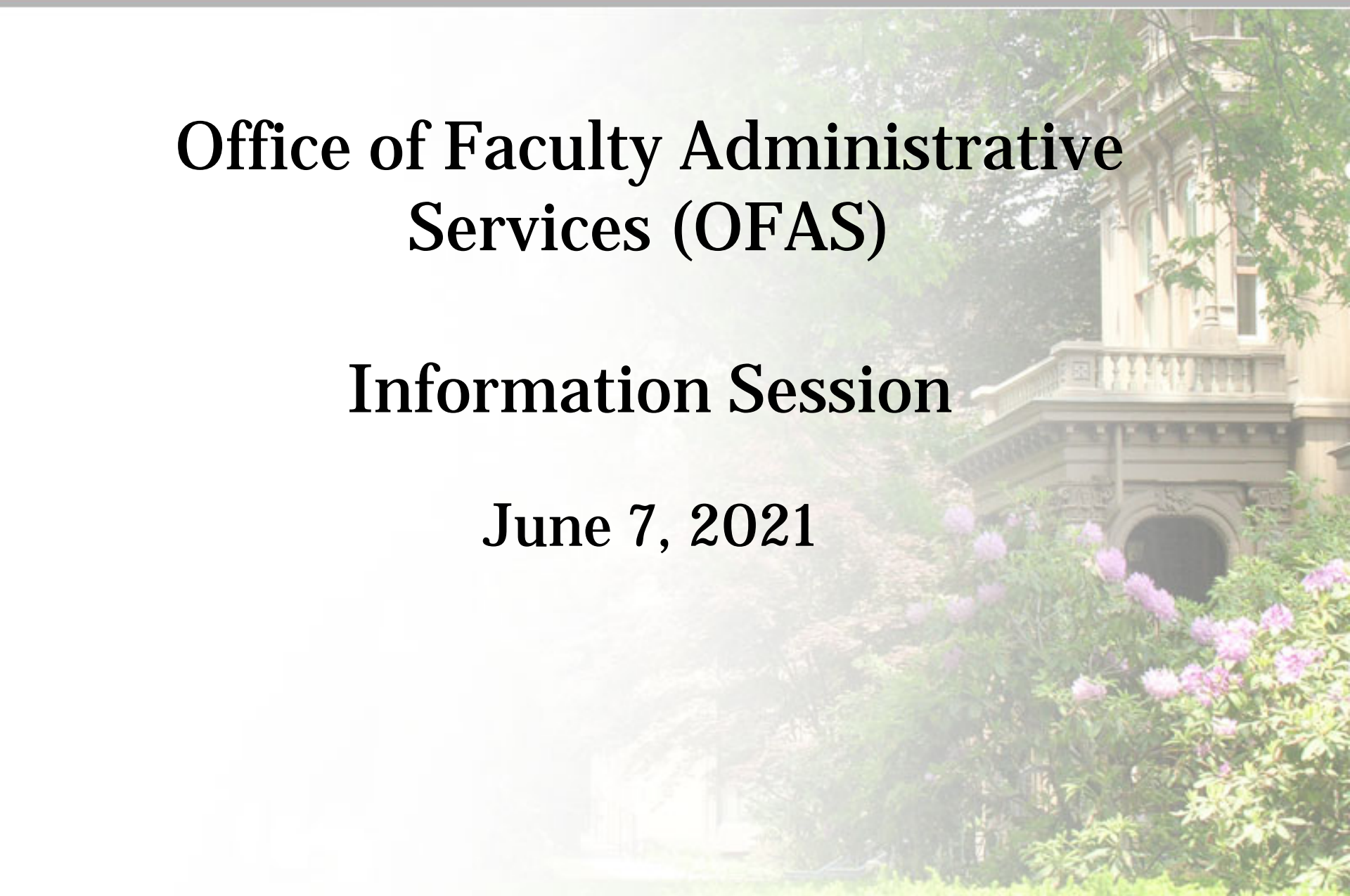


**Office of Faculty Administrative
Services (OFAS)**

Information Session

June 7, 2021



Agenda

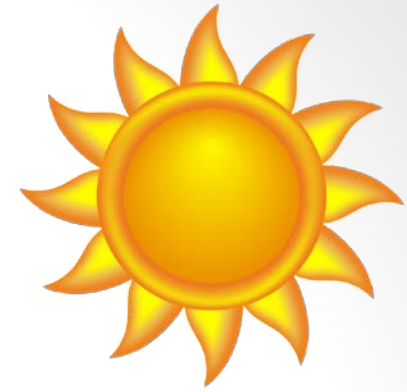
Summer Compensation

- Policies and Procedures – Presented by Karen Milner and Abby Scott, Provost's Office
-

Reminders, Updates and Important Notes

Summer Compensation

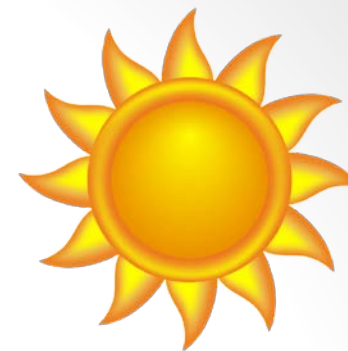
Summer Compensation Policies



Refer to 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) and part-year faculty are not eligible for summer compensation
- Faculty may not accept other employment during any month in the summer when also receiving full-time Yale salary

Summer Compensation Policies Continued..



- Maximum amount each month is 1/9 of academic year salary
- Cap on summer ninths is 2.5 ninths each summer from external sources (i.e, sponsored awards) without an exception. To receive 3 ninths in a single summer entirely from external sources, please submit an exception request to provostforms@yale.edu to coincide with the submission of the transaction in Workday.
- You can go up to 3 months without an exception if you are using a combination of internal sources for at least 0.5 of a ninth (i.e, unrestricted operating, FAS Bank, LSU, etc.)
 - Example: If you are charging 2.5 ninths to a grant, you can go up to 3 months without an exception if the other 0.5 month is being charged to an internal source such as an FAS Bank account.
- Faculty with administrative dual appointments (chair, head of college, etc.) are capped at 2 summer ninths from external sources without an exception and cannot receive more than 2.5 ninths with an exception.

Summer Compensation Deadlines

Please submit forms as early as you can.

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

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

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

August							
WK	Mo	Tu	We	Th	Fr	Sa	Su
30							1
31	2	3	4	5	6	7	8
32	9	10	11	12	13	14	15
33	16	17	18	19	20	21	22
34	23	24	25	26	27	28	29
35	30	31					

Reminders for the Period Activity Pay screen

Academic Period * Summer Compensation (June 2018)

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. They should be the same!

Payment Dates = Payroll Dates

Add more activity lines as needed

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

The screenshot shows the 'Yale Period Activity Pay' screen. At the top left, there is a 'Rate Matrix' section with 'Yale Period Activity Pay' and a 'Reason' dropdown menu showing 'X Period Activity > New Assignment > Summer Compensation Assignment'. Below this is a '1 item' indicator and a plus sign button. The main form is divided into several columns: '*Activity', '*Activity Dates', '*Units', '*Compensation', and 'Payments'. The '*Activity' column has fields for 'Activity *', 'Task', and 'Comment'. The '*Activity Dates' column has 'Start Date *' and 'End Date *' fields. The '*Units' column has 'Unit Type', 'Quantity *', 'Default Quantity', 'Assigned Unit Rate *', and 'Default Unit Rate'. The '*Compensation' column has 'Total Amount *', 'Currency', and 'Costing Overrides'. The 'Payments' column has 'Start Date', 'End Date', 'Do Not Pay', 'Number of Payments', 'Remaining Balance', 'Paid to Date', and 'Currency'. A red arrow points to a plus sign button in the top left of the form area. A red box highlights the 'Start Date' and 'End Date' fields. A blue circle highlights the 'Start Date' and 'End Date' fields in the 'Payments' column. A yellow circle highlights a button with '0' in the 'Assigned Unit Rate' field. A red box highlights the 'Comment' field. A yellow box highlights the '0' button in the 'Assigned Unit Rate' field.

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 summer work*. Contact the home department if you don't know.
- Selecting the correct *Activity* is very important to the review process. Our ability to apply the summer comp policies depends on the *Activity Code* being correct. The *Activity should align with the COA*. Please don't guess. Reviewers should double-check this.
- You can *add multiple activity blocks to the same Business Process* (BP) and each activity line can have multiple COAs, but the COAs must align with the Activity code for that block!
- 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 enter the next one. You don't need to wait until the new month, you just need to wait until the first BP is done.



Reminders on Summer Comp Positions

- Any academic department can create a Summer Compensation position for any eligible 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 members 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.

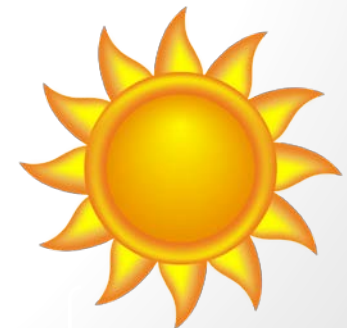
For assistance with Workday, see the Training Guide: *Instructions for Paying Summer Compensation in Workday* online at [Workday @ Yale Training, \(https://workday.training.yale.edu/training-materials/paying-summer-compensation-workday\)](https://workday.training.yale.edu/training-materials/paying-summer-compensation-workday)



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



Teacher Summer Programs Job Continued...

- Besides Yale Summer Session, the only time a Teacher Summer Programs job should be used is if:
 - You are paying faculty who do not have an active appointment for the summer months, but have had an active appointment in the current calendar year & are still active in Workday.
 - If faculty have not had an active appointment in the current calendar year, they should be paid as a vendor.
 - Outside of Yale Summer Session, using a Teacher Summer Programs job is a rare occasion, so please contact Provostforms@yale.edu to confirm this is the correct process before taking action.



Summer Compensation Documentation

- Departments that have hired a faculty member for specific employment, such as teaching a summer program, should issue and upload into Workday the letter engaging the faculty member for the summer work. Emails between staff members about the payment are not sufficient. We must see the documentation that went to the faculty member that captures the terms of the arrangement.
- This is different from the university appointment letter in which someone is hired to work for the University. We do not want faculty appointment letters in Workday. For Summer Bank and LSU ninths, we generally do not need back-up since we have the offer letters. If we need more information from you, we'll reach out.
- Do not upload back-up for Grants—this includes emails with faculty members. Departments are to keep that information locally, not in Workday.
- Summer comp is typically not charged to gifts, but if you have a transaction like this, please send the gift documentation/budget that demonstrates it is appropriate to charge summer comp to this gift to provostforms@yale.edu.



Workday Training Guides

- *Paying Summer Compensation in Workday*
 - Instructions for entering summer comp payments using the Workday business process, *Manage Period Activity Pay Assignments*, as well as instructions for creating a Summer Compensation or Teacher Summer Programs job
 - <https://workday.training.yale.edu/training-materials/paying-summer-compensation-workday>

- *Processing Summer Instructors*
 - Explains how different faculty are handled over the summer
 - <https://workday.training.yale.edu/training-materials/processing-summer-instructors>

- *Transferring Faculty to Summer Session*
 - Instructions for transferring faculty who are teaching in Summer Session if they are being terminated in your department
 - <https://workday.training.yale.edu/training-materials/transferring-faculty-summer-session>



Questions?



Reminders, Updates and Important Notes

Summer Deadline

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.



Submitting Supporting Documentation

NOTE: NONE OF US ARE AUTHORIZED TO APPROVE APPOINTMENTS OR COMPENSATION. ALL TRANSACTIONS MUST BE APPROVED BY THE PROVOST'S OFFICE AND MUST BE WELL DOCUMENTED.

All transactions require supporting documentation

- Refer to <http://facultyadmin.yale.edu/admin-processes>
- Combine all required documents into a single pdf
- Submit all documents to 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



Need help?

- Always send questions to 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 regarding Hire business process in Workday



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.

Secondary Appointments



Reminder --

- The end date cannot go beyond the primary appointment end date

Tip --

- 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 1 item

Turn off the new

Academic Unit	Track Type	Title	Start Date	End Date	Identifier
Chemistry	Non Ladder - Teaching >> Teaching	Senior Lecturer in Chemistry	07/01/2018	06/30/2023	P - Primary

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

Extension use same start date

1 item

Title	Roster %	Track Start	Appointment Start	Appointment End	Position Number	Job Profile	HR FTE	Blended FTE	Pay	
Associate Research Scientist	100.00%	09/01/2019	09/01/2020	08/31/2021	P283320	Associate Research Scientist	100.00%	100.00%	Yes	<input type="button" value="Update"/>

Terminations



Resignation or retirement letter

- **Required** if leaving before current appointment end date or tenured appointment

When entering terminations in Workday

- Always begin with *Terminate Employee* business process.
 - This will automatically launch *End Academic Appointment* business process to end the Primary appointment
- **Do not** select Resignation or Retirement as the reason unless **BOTH** of the following conditions are met
 - (1) the individual is leaving prior to the appointment end date
AND
 - (2) the individual has submitted a letter stating this as the case

Have a wonderful summer!

