

Office of Faculty Administrative Services (OFAS)

Summer Compensation Training Session

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Office of the Provost

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Agenda

1. Overview of Summer Compensation
2. New Workflows for Summer 2025
3. Responsibilities: Dept & Approver
4. Entering & Correcting Summer Comp in WD
5. Summer Comp Request Form
6. Exceptions
7. Monthly Deadlines
8. Resources

What is summer compensation?

For policies related to summer compensation, refer to the [Faculty Handbook](#) under Faculty Compensation, Benefits, and Services (Section XXI.B)

- Summer compensation is compensation paid during the summer period that is over and above a faculty member's annual base salary.
- It should only be paid for work performed during the summer months of June, July or August.
- Common types of summer compensation at Yale:
 - 1) Summer Instruction: teaching courses during the summer for one of the Yale summer programs such as Yale Summer Session (YSS)
 - 2) Research: research work funded by a grant or university-funded account

Who's eligible for summer comp?

- Faculty on nine-month academic year appointments are eligible for summer compensation. You should be able to see their Annual Work Period by reviewing the Workday record. *If you can't see the full WD record, either contact the home dept or reach out to the Provost's Office.*
- Faculty from the School of Medicine, School of Public Health and School of Nursing, are not eligible because their appointments are for twelve months.
- Research faculty (research scientists) and postdocs are not eligible.

Process Changes for Summer 2025

1. **Faculty members will only have 1 summer compensation position moving forward.**
 - a) Home Departments will be responsible for inputting faculty summer compensation into Manage Period Activity Pay
2. **New Workday Manage Period Activity Pay routing**
 - a) Home department inputs>Business Partner approves>CC Manager(s) approve
 - b) A summer comp (aka Manage Period Activity Pay) business process will be “successfully completed” after cost center manager(s) approve the transaction.

*The Provost's Office will review summer compensation payments **after** they are approved in Workday to ensure the period activity codes are correct, and caps are being met.*

Summer Compensation Workflow

Summer Compensation List is created



Appropriate parties review list for accuracy.



Home Department adds summer comp job in Workday (if needed).
Only 1 summer compensation position per faculty.



Home Department enters summer compensation payments into Workday.



Home Department Business Partner reviews and approves payments and costing.



Cost Center Manager(s) review and approve payments and costing.



Payment is fully approved and ready to be paid.



Monthly payroll runs per schedule.

New Routing Process

1. Home department requestor inputs
2. Home department business partner reviews and approves
3. Cost Center Managers review and approve
 - a) IF there are multiple cost centers on the charging instructions then 1 cost center manager from each will need to approve the payment before fully approved.
 - b) If there is more than one cost center manager for cost center A, only one of those cost center managers need to approve. (Same approval routing as journal entries).

Process History

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Period Activity Pay	Period Activity Pay	Submitted	4/1/2025 14:44		Requestor, Department	1	
Period Activity Pay	Review Period Activity Pay Assignment	Approved	4/1/2025 14:45	4/2/2025	Partner, Business	1	
Period Activity Pay	Approval by Cost Center Manager	Awaiting Action			Cost Center Manager, A1	3	
					Cost Center Manager, A2	3	
					Cost Center Manager, A3	3	
Period Activity Pay	Approval by Cost Center Manager	Awaiting Action			Cost Center Manager, B1	2	
					Cost Center Manager, B2	2	

Home Department Responsibility

As of 2025, home departments are responsible inputting all their faculty summer compensation payments, even if charging is to another COA.

Faculty members will only have **1** summer compensation position within their home department org.

Approver Responsibility

Approvers are responsible for ensuring the accuracy of all details of summer compensation payments.

Approvers include the requestor of the payment, business partner approver and cost center manager approvers.

Please be sure the following aspects are correct before approving:

- ✓ Ensure the person is eligible to receive summer compensation based on rank and appointment effective dates.
- ✓ Correct funding sources are being used.
- ✓ Correct Period Activity Codes and COA's are being used.
- ✓ Funding sources should have enough funds to cover salary and fringe.
- ✓ Each monthly payment cannot be over **1/9th**. *The Provost's Office will also review summer comp payments to ensure all 1/9th and caps are being met. We'll reach out to departments as needed.*
- ✓ For faculty with dual academic administrative appointments (Dept Chair, Dean or Head of College), the cap for summer is **2/9ths** on grants.
- ✓ Yale has a funding cap of **2.5/9ths** when the funding source is from external sources, e.g., grants. *If someone wants to put more than 2.5/9ths of summer comp on grants, work with the faculty member to obtain an exception from the Provost's Office before approving the August payment. The overall total cannot exceed more than 3/9ths. Send exception requests to summercomp.provost@yale.edu*
- ✓ Make sure you have reviewed the justification for the payment and have the appropriate documentation on hand in the event that questions come up later.

Period Activity Pay screen

Academic Period ★ Summer Compensation (June 2025)

16,666.66 USD

For more information, please visit Summer Compensation Website.

<https://facultyadmin.yale.edu/administrative-processes/managing-compensation/summer-compensation>

Rate Matrix Yale Period Activity Pay

Reason ★

- Period Activity > New
- Assignment > Summer Compensation Assignment

1 Item

*Activity	*Activity Dates	*Units	*Compensation	Payments
<p>Activity ★</p> <p>× Non-NIH - Non-NIH Sponsored Awards</p> <p>Task</p> <p>Comment</p>	<p>Start Date ★</p> <p>06/01/2025</p> <p>End Date ★</p> <p>06/30/2025</p> <p>Use as Payment Date Range</p> <p><input checked="" type="checkbox"/></p> <p>Weeks in Activity Period</p> <p>4.29</p>	<p>Unit Type</p> <p>Summer Compensation Element</p> <p>Quantity ★</p> <p>1</p> <p>Default Quantity</p> <p>0</p> <p>Assigned Unit Rate ★</p> <p>16,666.66</p> <p>Default Unit Rate</p> <p>00</p>	<p>Total Amount ★</p> <p>16,666.66</p> <p>Currency</p> <p>USD</p> <p>Costing Overrides</p> <p>1</p>	<p>Start Date</p> <p>06/01/2025</p> <p>End Date</p> <p>06/30/2025</p> <p>Do Not Pay</p> <p><input type="checkbox"/></p> <p>Customize 1 Payment</p> <p>Customized</p> <p><input type="checkbox"/></p> <p>Remaining Balance</p>

Briefly indicate the justification for the payment. For example, “per offer letter dated 2/25/2025” or “per the grant budget”. If it is a payment for summer work, attach the hire letter to the transaction.

For **REPLACING** or **ADDING** to a completed BP, please indicate what you’re doing such as: “Addition to June payment on 7/10/25. Adding \$8,000 charged to GRXXXX” 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

Correcting a Summer Compensation Transaction

If you need to correct a summer compensation transaction, you may be able to make changes in Workday. The types of changes you can make will depend on whether the Payroll has not yet started to calculate, is calculating or is complete.

- In Workday, initiate Manage Period Activity Pay and select time frame and position as per usual.
- For the Reason Code, select the 2nd option “Period Activity>REVISION to Assignment” Reason

Rate Matrix Yale Period Activity Pay

Reason * Search ☰

- Period Activity > New Assignment >
- Period Activity > REVISION to Assignment >

1 item

	*Activity	*Activity Dates
(+)		

Correcting a Summer Comp Transaction

SCENARIO:	HOW TO CORRECT:
Payroll has started to calculate, <u>but is not complete</u>	Initiate Manage Period Activity Pay Process
Revise a previously approved entry	<ul style="list-style-type: none"> - Select the "REVISION" reason code - Correct the entry on the matrix OR - Click "+" to add new row(s) and enter the correct information - Click "-" to remove the incorrect row(s)
Cancel a previously approved entry	<ul style="list-style-type: none"> - Email faculty.admin@yale.edu and request that the payment be rescinded

Rate Matrix Yale Period Activity Pay

Reason * × Period Activity > REVISION to Assignment > Summer Compensation Assignment ⋮

2 items

+	*Activity	*Activity Dates
-	Activity *	Start Date *

Correcting a Summer Comp Transaction

SCENARIO:	HOW TO CORRECT:
Payroll is COMPLETE	Initiate Manage Period Activity Pay Process
Add additional funds for retroactive payment (underpayment)	<ul style="list-style-type: none">- Select the "REVISION" reason code- Click "+" to add new row(s) and enter the correct information.- Activity dates should align with the Activity Period.- Payment Dates must be updated to align with the next payroll dates. <i>Note: Payment dates can be complicated for expired grants, so contact the Provost's Office before processing these payments.</i>
Recover an overpayment	<ul style="list-style-type: none">- If payroll is complete, you cannot alter the transaction. If the person has been overpaid, you will need to prepare a Payroll Adjustment form. Contact the Provost's Office for guidance.

Period Activity Codes

Please ensure accurate period activity codes with the correct COA.

Period Activity Code	Description	Use
9/9 - Faculty 9 Over 9 Account	Participants in the 9 over 9 program only. There should be an available balance in the faculty's YD000248 account.	YD value must be: YD000248 9-over-9 Funded. This is the only code that can be used for this YD value.
AYA - Association of Yale Alumni	Yale Alumni Association summer compensation only	Position of "Summer Compensation - Association of Yale Alumni"
FAS Bank - Summer Bank	Summer Comp Banked months provided and managed by FAS	YD000004.CCxxxx.PG00003.PJ000001
SEAS Bank - Summer Bank	Summer Comp Banked months provided and managed by SEAS	YD000004.CC1873.PG00003.PJ000001.asignee
DIV- Divinity Summer Courses	Divinity School Summer compensation	Position of "Summer Compensation - School of Divinity"
PRV LSU - Lab Set-Up Account from Provost (non-SDF)	Summer months included in the research start up portion of an offer letter that are funded by the Provost Office (but not SDF). YCNC, WTI commitments.	YD Value must be YD000245 Provost Funded - General
SDF LSU - Lab Set-Up Account	Summer months included in the research start up portion of an offer letter that are funded by the Science Development Fund (SDF). You should have an SDF commitment number to confirm appropriate available funding.	YD Value must be the YD determined on the SDF commitment. Most commonly: YD000268 SDF Funded - Recruitment - Research SDF must be noted in the YD value, no other YD value can be used on this period activity code.
NIH - NIH Sponsored Awards	NIH awards only.	Grant must be used in the COA segment. If unsure, work with your FRMS analyst to determine if your Grant is NIH or not.
Non-NIH - Non-NIH Sponsored Awards	All other grant awards.	Grant must be used in the COA segment. If unsure, work with your FRMS analyst to determine if your Grant is NIH or not.
NOR - Norfolk Program	Norfolk Program within School of Music	Position of "Summer Compensation - School of Music"
NUS - Yale-NUS Summer Programs	Teaching in Yale-NUS Summer Global Institute and Leadership Program	Cost Center: CC0088 YCONUS Yale-NUS New Haven
OIA - Office of International Affairs Programs	Summer session for supervisory org of OIA/Global Scholars. This is not for Yale Global Scholars Program, there is a separate period activity code for this.	Cost Center: CC1719 VPGOIA Leadership Programs
TI - Teachers Institute	Yale New Haven Teachers Institute	Position of "Summer Compensation - Yale-New Haven Teachers Institute" Cost Center: CC0260 ACANTI Yale-New Haven Teachers Institute
YSG - Yale Global Scholars Program	Yale Global Scholars Program	Program: PG01310 Young Global Scholars (22) Cost Center: CC0094 VPGOIA Young Global Scholars
YSS - Yale Summer Session Program	Yale Summer Session	Only to be used by the Yale Summer Session team
YSC - Yale Summer Compensation (all other not listed above)	All other Summer Compensation	Anything that doesn't fall into another category. Should be Non-Grant, Unrestricted funding.

Documentation

- Departments that will hire a faculty member for specific employment, such as teaching a summer program, should issue a hire letter and attach it to the summer compensation business process. Hire letters must include the dates that the work will be performed, the amount of the payment and a brief description of the work. Emails between staff members about the payment are not sufficient.
- Hire letters for summer teaching programs are different from university appointment letters for Assistant, Associate and full Professor appointments. **Do not upload faculty appointment letters in Workday.**
- Do not upload back-up for Grants, 9/9 or LSU summer comp-this includes emails with faculty members. Departments are expected to validate and maintain records justifying summer compensation allocations internally.
- Departments need to receive and document approval of summer compensation payments if processing for other departments, such as for an allocation to a grant held at the Med School.

Universal Summer Compensation Form

- Optional forms for departments and/or FRMS to use to assist in facilitating summer compensation payments.
- This form is for internal use and will not be submitted or approved by the Office of the Provost.
- Summer Compensation Request Form (PDF):
 - For faculty to fill out if they would like to request summer compensation.
- Summer Compensation Request Form Calculations (Excel):
 - For departments and/or FRMS to calculate and track the details of summer compensation.
 - Amounts, COA's, Period Activity Codes, etc.

Summer Compensation Request Form (PDF)

Summer Compensation Request Form

Name:	
Department:	
Contact:	

Lead Admin and/or Ops Manager:	
FRMS Analyst:	

Rules of Summer Compensation:

1. Total summer compensation cannot exceed 3.0 months and cannot exceed 1/9th salary per month.
2. Compensation on a sponsored award cannot exceed 2.5 months and cannot exceed 2.0 months if you have other academic roles (dual-appointment).
3. Effort expended during the summer must be commensurate with the months of summer compensation requested.
4. Faculty members may not accept other employment while receiving summer salary from Yale-administered funds.
5. Summer Compensation may not be paid from departmental funds.

☐ I understand these rules and wish to apply for summer compensation

Indicate effort amount and funding source per month:

- Effort dates must coincide with grants charged.
- If grant is subject to NIH Cap, indicate if you'd like the over the cap charged to your 9over9 account. (Examples: June GR123456 + OTC & July GR654321 no OTC)

May:	
June:	
July:	
August:	

Signature:		Date:	
PI Approval (If a grant will be charged):		Date:	

Summer Compensation Request Form Calculations (Excel)

[illegible]

Exceptions

Departmental business partners must confirm approval by the Provost's Office for the exception requests before approving the BP

Summer Compensation Effort Flowchart

1/9th	2/9ths	2.5/9ths	Above 2.5/9ths and up to 3/9ths
<p>Total Payment</p> <p>Each monthly payment cannot exceed more than 1/9th of faculty's base salary.</p> <p>One-ninth of summer salary represents 100% effort for effort reporting purposes</p>	<p>Dual academic administrative appointments (Chair, Head of College, Dean):</p> <p>Overall cap for the summer is reduced by an additional half-ninth. People in this category are capped at 2 ninths on grants.</p>	<p>Grants:</p> <p>Yale has a funding cap of 2.5 ninths when the funding source is from external sources, e.g., grants. The purpose of this cap on external funds ninths is to ensure people are paying close attention to Effort Reporting Requirements on grant payments.</p> <p>With Exception:</p> <p>Dual academic administrative appointments (Chair, Head of College, Dean):</p> <p>With a Provostial exception, people in this group can go up to 2.5 ninths maximum from grants for the summer.</p>	<p>Internal funding sources:</p> <p>There are occasionally situations where someone has sufficient funding sources to receive 3 full ninths from a variety of different sources—university research funding, grants, summer program teaching etc. As long as the overall total is under 3 ninths and the grant-funded piece is at 2.5 ninths or less, faculty do not need to request an exception from the Provost's Office.</p> <p>With Exception:</p> <p>Grants:</p> <p>When someone wants to put anything above 2.5 ninths on grants/ external sources, they should submit a request to the Provost's Office for an exception before the transaction is approved in Workday.</p>

Exception Request Process

All exception requests to exceed maximum effort must be submitted to summercomp.provost@yale.edu.

As of FY25, a new summer compensation exception form must be filled out and submitted for approval **PRIOR** to the exception being submitted.

Please find the exception form at:

<https://facultyadmin.yale.edu/administrative-processes/managing-compensation/summer-compensation>

Exception Form Preview

Summer Compensation:

Exception request to receive >2.5 months against sponsored awards

(Requests should be submitted to summercomp.provost@yale.edu)

(Subject: Permission to receive # months of summer compensation charged to sponsored awards)

*Exception Requests and Approval must be complete **prior** to exception occurring.*

Requestor Name:	Lead Admin Contact Name:
Department:	FRMS Contact Name:
Faculty Name:	Additional Contacts if needed:

Requesting permission to receive months of salary for summer charged to sponsored awards.

Enrolled in the 9 over 9 program? Yes: ☐ No: ☐ Other:

Dual Appointment? Yes: ☐ No: ☐

Are you able to meet the expectation of the award using effort in the academic year instead of needing an exception for summer effort? Yes: ☐ No: ☐

Explanation:

Details on why an exception for summer compensation is needed: (Ex. Award is ending in October, maxed out on academic effort, need one-time exception)

Attestation:




I am verifying I have requested this exception to meet my current effort commitments to sponsors.

Working with FRMS, I have reduced my effort commitments within the percentage allowable for both the academic and summer periods. Further reductions will exceed 25% or more from the level of effort committed to my awards and would therefore be considered a significant reduction requiring prior approval from the sponsor.

In requesting this exception for summer salary from non-university (external) sponsored research funds, I agree that I will not be:

- carrying out activities inconsistent with the effort defined for sponsored project(s);
- performing significant administrative activities (e.g., departmental, University, national, editorial);
- taking more than minimal time away; teaching or preparing for teaching.

I am verifying that I understand that this exception for above 2.5 months (2 months for Dual) needs to be provided and approved before the certification of summer month effort.

Faculty Name:	Faculty Signature: 	Date: <input type="text"/>
Dept. Chair Name:	Dept. Chair Signature: 	Date: <input type="text"/>
Provost Name:	Provost Signature: 	Date: <input type="text"/>

Payroll Accounting Adjustments (PAA's)

- All PAA's must be approved by the Provost's Office prior to input into Workday.
- All requests must be submitted to summercomp.provost@yale.edu.
- Please include details of transactions, COA and why the PAA is necessary for Provost's Office review.

Deadlines

Please approve summer compensation BPs by the **15th** of the month.

- This will allow time for the Provost's Office time to review upcoming payroll reports.
- Departments should also carefully review their summer comp transactions using the Payroll Results report.

June 2025							
No.	Sa	Mo	Tu	We	Th	Fr	Sa
23	1	2	3	4	5	6	7
24	8	9	10	11	12	13	14
25	15	16	17	18	19	20	21
26	22	23	24	25	26	27	28
27	29	30					

July 2025							
No.	Sa	Mo	Tu	We	Th	Fr	Sa
27			1	2	3	4	5
28	6	7	8	9	10	11	12
29	13	14	15	16	17	18	19
30	20	21	22	23	24	25	26
31	27	28	29	30	31		

August 2025							
No.	Sa	Mo	Tu	We	Th	Fr	Sa
31						1	2
32	3	4	5	6	7	8	9
33	10	11	12	13	14	15	16
34	17	18	19	20	21	22	23
35	24	25	26	27	28	29	30
36	31						

Workday Training Guides

<https://facultyadmin.yale.edu/administrative-processes/managing-compensation/summer-compensation>

➤ *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>

➤ *Revise a Summer Compensation Transaction*

Instructions on how to revise/edit a summer compensation in Manager Period Activity pay prior to payroll run.

<https://workday.training.yale.edu/training-materials/paying-summer-compensation-workday>

Questions?

Please send questions and exception requests to
summercomp.provost@yale.edu