



Workday : Managing Compensation for Faculty

Central Campus



Topics Covered

Getting Started

Key Concepts of Academic Compensation

Determining the Method of Payment

Academic Compensation and Job Change

Tips and Important Reminders

Demo of Worksheets

Resources

Getting Started

Basic assumptions for this course:

- *You know the difference between the academic record and the employee record.*
- *You know the difference between hiring and reappointing a faculty member.*
- *You know what a supervisory organization is and how to look this up for an employee.*

GETTING STARTED

Getting Started

Before starting any transaction in Workday, here are some questions to consider:

- *What do you want to do?*
- *Have you obtained the necessary permissions from the Dean's and Provost's Offices? Do you have the supporting documentation?*
- *Who is the individual and have you checked Workday to search for a record or to examine the status of the record?*
- *What type of relationship will the individual have, or does the individual have, with Yale? Is he or she performing work for another unit?*

Getting Started

Some questions to consider (con't):

- *Where will the individual be located primarily, i.e. in your supervisory org or a different one?*
 - Our point of view is that a faculty member should have one stable primary home and that unit takes responsibility for coordinating all payments for him or her.
- *Has this person been paid by Yale during this calendar year?*
 - If so, all payments must be entered into Workday as some form of compensation, i.e. you cannot pay with a check request.

Prerequisites

Prior to requesting any compensation changes or one-time payments, all initiators must:

- ✓ Communicate with all appropriate parties and follow all pre-existing approval processes outside of Workday (i.e., Provost's Office or Dean's Office).
- ✓ Gather all supporting documentation and submit to faculty.admin@yale.edu.

Conversations are still an integral precursor to any business process!



KEY CONCEPTS OF ACADEMIC COMPENSATION

Key Concepts of Academic Compensation

Time Type – Full time is always only 100% FTE, and part time is anything less than 100%.

**Default Weekly Hours* – The full time number of hours that the employee works. This is always 40 for academics and 37.5 for staff.

**Scheduled Weekly Hours* – The number of hours that the faculty member will work per week.

**These are not exposed on the employee record.*

Job Details

Position	P274401 Lecture for Training
Job Requisition	64149WD Lecture for Training (Open)
Employee Type	Faculty
Job Profile	Lecturer
Time Type	Part time
Location	Whitney Ave, 221
Pay Rate Type	Salary

Additional Information

Job Title	Lecturer
Business Title	Lecturer
Location Weekly Hours	40
Default Weekly Hours	40
Scheduled Weekly Hours	27.5
FTE	68.75%

Screenshot of completed hiring business process.

Key Concepts of Academic Compensation

Screenshot of employee record.

Supervisory organization – The only organization that can pay a faculty member.



FTE (% time) – The percent of time that the faculty member is working. This is a Workday calculated field derived by dividing the Scheduled Weekly Hours by the Default Weekly Hours.



Example:

11 hours / 40 hours = 27.5%

Job Details

Employee ID	[REDACTED]
Organization	Yale University (Salovey, Peter) >> School of Nursing - Dean's Office (Portillo, Carmen)
Position	P248900 Lecturer
Business Title	Lecturer
Job Profile	Lecturer
Employee Type	Faculty
Time Type	Part time
FTE	27.50%
Location	WC Office Complex North
Annual Work Period	4 Month AWP - September (September 1 - December 31)
Work Period Percent of Year	33.33%
Blended FTE	9.17%
Disbursement Plan Period	4 Month DP - September (September 1 - December 31)

Key Concepts of Academic Compensation

Screenshot of employee record.

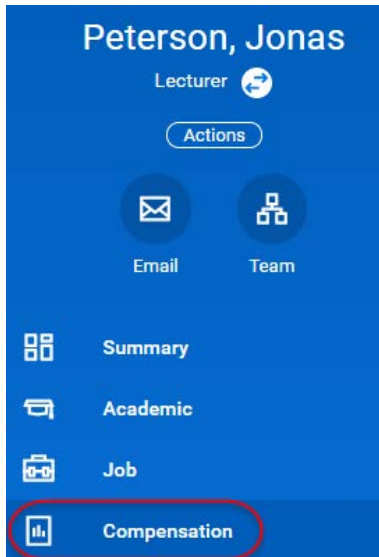
Annual Work Period (AWP) – The time period when the work is being completed. This sets limitations on the disbursement of pay.

Disbursement Plan Period (DPP) – The period when pay will be disbursed. If this is not aligned correctly, pay will not be generated.

Job Details

Employee ID	
Organization	Yale University (Salovey, Peter) >> School of Nursing - Dean's Office (Portillo, Carmen)
Position	P248900 Lecturer
Business Title	Lecturer
Job Profile	Lecturer
Employee Type	Faculty
Time Type	Part time
FTE	27.50%
Location	WC Office Complex North
Annual Work Period	4 Month AWP - September (September 1 - December 31)
Work Period Percent of Year	33.33%
Blended FTE	9.17%
Disbursement Plan Period	4 Month DP - September (September 1 - December 31)

Key Concepts of Academic Compensation



Academic Salary – The compensation plan used for paying all academics.

Annual – The amount that would be paid to a faculty member if working full time (100% FTE).

Prorated – The actual amount being paid to a faculty member who is working part time. This only appears if the faculty member is *less than* 100% FTE.

Plan Assignments 2 items

Effective Date	Plan Type	Compensation Plan	Assignment
07/01/2018	Salary	Academic Salary	53,700.00 USD Annual (Prorated: 31,307.10)
06/30/2018	Merit	Faculty Annual Salary Review (School of Art)	3.00% Annual

DETERMINING THE METHOD OF PAYMENT

Determining the Method of Payment

There are three Workday business processes that can be used to adjust pay for faculty:



Compensation > Request One- Time Payment

Extra compensation
such as Taxable
Reimbursements,
Bonuses, Awards and
Prizes...



Compensation > Request Compensation Change

Submit changes to
salary including
recurring ongoing
payments
(Allowances)



Job Change > Transfer, Promote, or Change Job

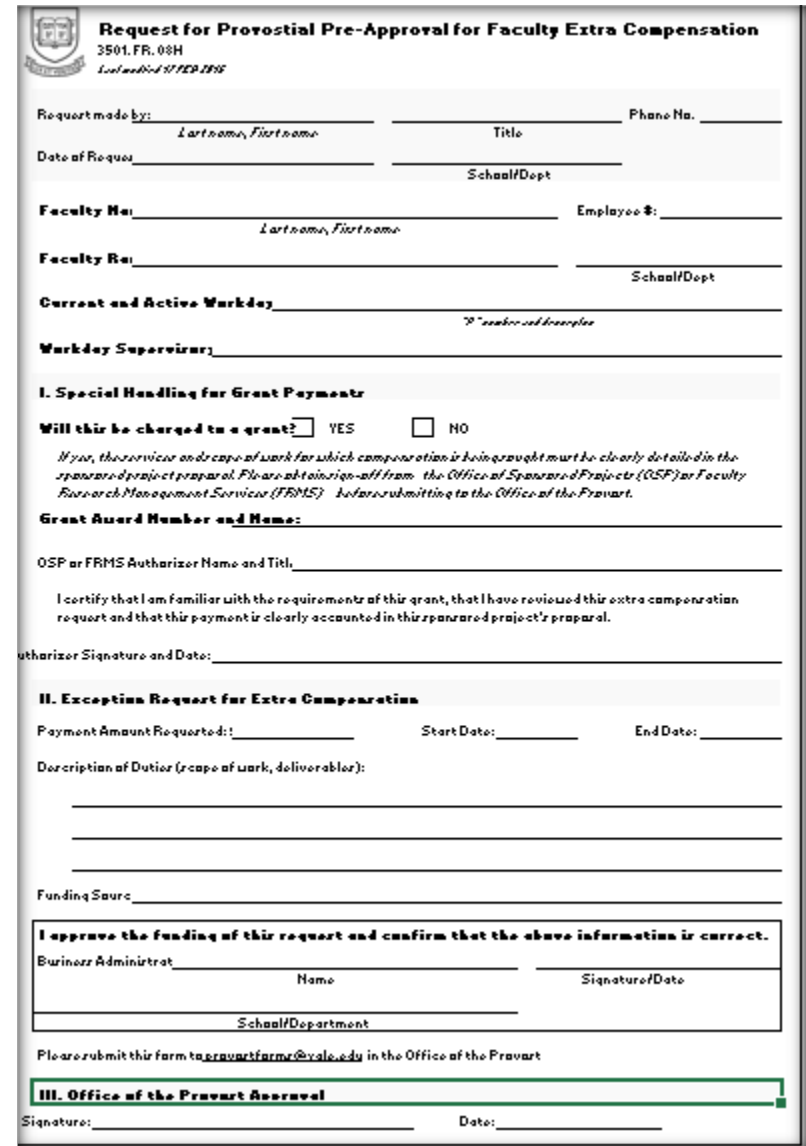
Submit changes to
items on the employee
record that impact
compensation, i.e.
FTE %, AWP, and DPP

Determining the Method of Payment

ALL extra compensation, either one-time or on-going, requires prior approval from the **Provost's Office**.

You must complete and submit the Provostial Pre-Approval form in advance of paying any faculty member (<https://your.yale.edu/node/47041>)

If approved, you will use one of the two **Compensation** processes on the prior page to enter payment in Workday.



Request for Provostial Pre-Approval for Faculty Extra Compensation
3501.FR.08H
Last modified 11 FEB 2016

Request made by: _____ Title _____ Phone No. _____
Last name, First name

Date of Request _____ School/Dept _____

Faculty Member: _____ Employee #: _____
Last name, First name

Faculty Role: _____ School/Dept _____

Current and Active Workday _____
SP number and description

Workday Supervisor: _____

I. Special Handling for Grant Payments

Will this be charged to a grant? ☐ YES ☐ NO

If yes, the service and scope of work for which compensation is being sought must be clearly detailed in the sponsored project proposal. Please obtain sign-off from the Office of Sponsored Projects (OSP) or Faculty Research Management Services (FRMS) before submitting to the Office of the Provost.

Grant Award Number and Name: _____

OSP or FRMS Authorizer Name and Title: _____

I certify that I am familiar with the requirements of this grant, that I have reviewed this extra compensation request and that this payment is clearly accounted in this sponsored project's proposal.

Authorizer Signature and Date: _____

II. Exception Request for Extra Compensation

Payment Amount Requested: _____ Start Date: _____ End Date: _____

Description of Duties (scope of work, deliverables):

Funding Source: _____

I approve the funding of this request and confirm that the above information is correct.

Business Administrator: _____ Name _____ Signature/Date _____
School/Department _____

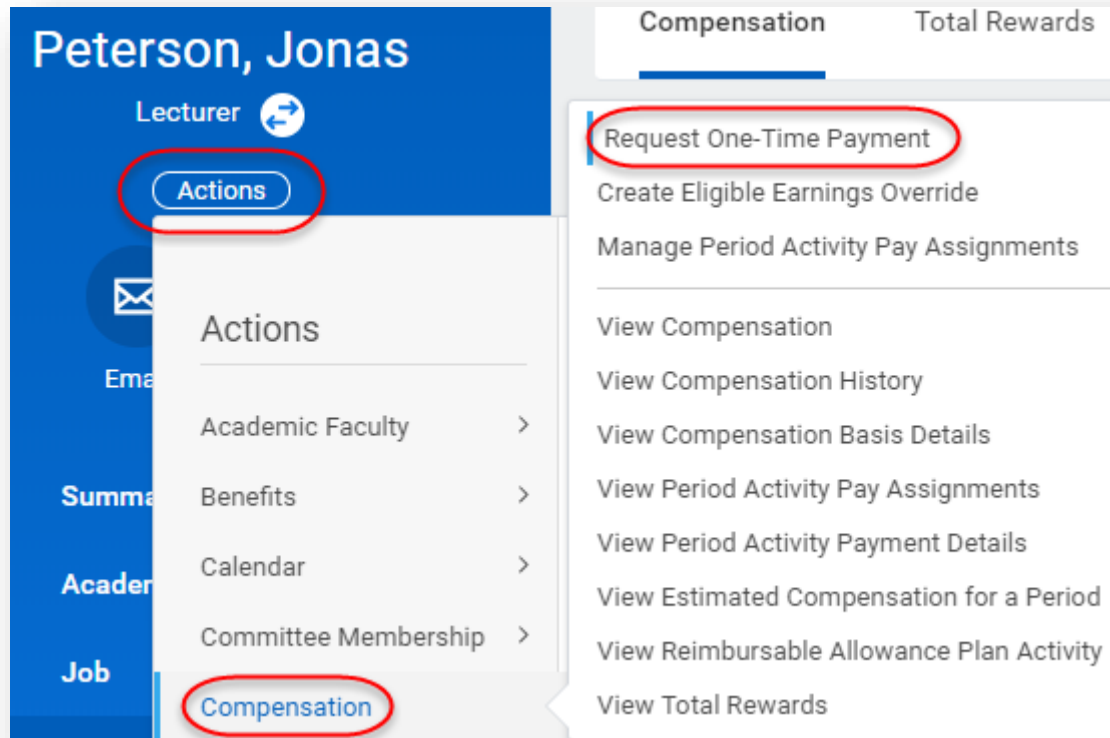
Please submit this form to provostfrms@yale.edu in the Office of the Provost

III. Office of the Provost Approval

Signature: _____ Date: _____

REQUEST ONE-TIME PAYMENT

One-Time Payments



Recurring (on-going) one-time payments should be submitted as an *Allowance* in the “Request Compensation Change” business process.

One-Time Payments: Reason Codes for Faculty Payments

Reason codes should be selected carefully. If you don't know which to pick, consult with OFAS or YSM Financial Operations.

Note: Some reasons that will appear on the list in Workday are for use with staff only.

Reason Category	Reason	
Additional Reason	Adoption Reimbursement	Incremental Teaching
	Affiliated Program	Interim Assignment
	Awards and Prizes	Master Supplement
	Clinical Bonus	Mortgage Supplement
	Departmental Bonus Program	Non-Taxable Moving Expense
	Dependent Care	On Call Pay
	Differential Pay	Retention Bonus
	Extra Compensation	Second Job
	Faculty Education	Special Recognition Award
	Homebuyer Program	Taxable Moving Expense
	Incidental Research Pay	Vehicle Stipend
	Incremental Services	
Reason Category	Reason	
Hire Agreement	Biannual Stipend	
	Bonus	
	Housing	
	Non-Taxable Moving Expense	
	Taxable Moving Expense	
	Travel	
	Tuition	

One-Time Payment Plans for Faculty

Compensation Plans –

Selection of the correct one is critical. It may have an impact on

- Routing for approvals
- YURAP contributions
- Tax implications
- Budgetary considerations

Compensation Plan Name
Adoption Reimbursement
Defined Additional Compensation
Awards and Prizes
Bonus
Dependent Care
Faculty Education
FAS Faculty Special
Taxable Moving Expense
Non-Taxable Moving Expense
One-Time Extra Compensation
PDF Compensation
PDF Supplemental Refund
Sign-on Bonus
Taxable Reimbursement
Taxable Reimbursement 120

REQUEST COMPENSATION CHANGE

Request Compensation Change vs. Job Change

Use **Request Compensation Change** when you only need to make a change to the compensation plan, i.e. salary or allowances.

If you need to make a change to any of the following items, you will need to use the **Job Change > Transfer, Promote or Change Job**.

- FTE % time
- Annual Work Period
- Disbursement Plan Period

The screenshot shows a web interface for job details. At the top, there are three tabs: 'Job Details' (which is selected and circled in red), 'Management Chain', and 'Organizations'. Below the tabs, the 'Job Details' section is displayed. It contains a list of fields and their values. The 'FTE' field is circled in red and shows '66.60%'. At the bottom, there are two sections: 'Annual Work Period' and 'Disbursement Plan Period', both of which are circled in red. The 'Annual Work Period' section shows '5 Month AWP - August 9m (August 1 - December 31)'. The 'Disbursement Plan Period' section shows '5 Month DP - August (August 1 - December 31)'.

Job Details	
Employee ID	139382
Organization	Yale University (Salovey, Peter) >> English (Hammer, Langdon L)
Position	P22694 Lecturer
Business Title	
Job Profile	Lecturer
Employee Type	Faculty
Time Type	Part time
FTE	66.60%
Location	Kroon Hall
Annual Work Period	5 Month AWP - August 9m (August 1 - December 31)
Work Period Percent of Year	55.56%
Blended FTE	37.00%
Disbursement Plan Period	5 Month DP - August (August 1 - December 31)

Request Compensation Change vs. Job Change

Use **Request Compensation Change** when you only need to make a change to the compensation plan, i.e. salary or allowances, this includes adding compensation by changing from \$0 to an amount.

Example 1

Compensation

Total Rewards

Pay Change History

Other Compensation Details

Totals 1 item

Total Base Pay	Faculty Total Base Compensation	Currency	Frequency
0.00	0.00	USD	Annual

Example 2

Plan Assignments 3 items				
Effective Date	Plan Type	Compensation Plan	Assignment	End Date
09/01/2016	Allowance	FAS Faculty Special	878.81 USD Monthly	06/30/2017
09/01/2016	Allowance	Ongoing Extra Services	1,500.00 USD Monthly	06/30/2017

Request Compensation Change vs. Job Change

Request Compensation Change is also used to change or add the Actual End Date.

Actual End Date

- Insures that the compensation is removed after the appointment is completed.
- Changes the Compensation to \$0.
- Prevents active faculty member from being accidentally paid if not reappointed.
- Will cause benefits to be dropped.

Compensation

Total Rewards

Pay Change History

Other Compensation Details

Totals 1 item

Total Salary & Allowances	Total Base Pay	Faculty Total Base Compensation	Currency	Frequency
2,700.00	2,700.00	2,700.00	USD	Annual

Compensation

Compensation PackageFaculty and Other Academic

GradeNo Grade

CompanyYale University

Plan Assignments 1 item

Effective Date	Plan Type	Compensation Plan	Assignment	End Date
09/01/2017	Salary	Academic Salary	90,000.00 USD Annual (Prorated: 2,700.00)	12/31/2017

Request Compensation Change vs. Job Change

Reason codes should be selected carefully. If you don't know which to pick, consult with OFAS or YSM Financial Operations.

Reason	Description
Additional Duties Adjustment	Change in compensation due to additional duties
Chair Supplement	Payment for serving as department chair
Correction to Salary Amount	Correcting a salary that was incorrectly entered previously
FAS Faculty Special	Change in compensation reserved for FAS Dean's Office use
Interim Assignment	Change in compensation to reflect an interim assignment
Head of College Supplement	Supplement to Faculty for serving as a Head of a residential college, which could be a direct payment, money added to a research account, tuition for child education, etc.
Mortgage Supplement	Payment to offset mortgage deductions
Restructuring Faculty Comp Plan	Change in compensation to reflect restructuring of a faculty compensation plan

Request Compensation Change vs. Job Change

Use the **Change Job** business process when any other aspects of the position need to be changed. The **Change Job** business process allows you to make changes to Job Profile, FTE %, Annual Work Period and Disbursement Plan Period, as well as Compensation.



Sample of Job Change

Start

Job

Location

Details

Organization

Compensation

Start

Start Details

When do you want this change to take effect? *

Why are you making this change? *

Who will be the manager after this change? Initiator, 01

Which team will this person be on after this change? Training_Biochemistry Org 01 (Initiator, 01)

Where will this person be located after this change? * Training Yale University

➤ **When do you want this change to take effect?**

Enter date on which it will take effect. This should match the date in the appointment letter.

➤ **Why are you making this change?**

Reasons codes matter! They drive subsequent actions.

Reasons for Work Week Change (change in hours)	Description	Benefit Event Kicked off by this Reason
Work Week Change Remaining At/Above 20	Change in the scheduled work week that keeps employee at or above 20 hours per week	
Work Week Change Remaining Below 20	Change in the scheduled work week that keeps employee below 20 hours per week	
Work Week Change to Greater Than or Equal to 20	Change in the scheduled work week that raises employee from less than 20 hours per week to 20 hours or more per week	Yes
Work Week Change to Less Than 20	Change in the scheduled work week that drops employee from 20 hours or more per week to less than 20 hours per week	Yes

Sample of Job Change



The **Location** tab provides you the ability to edit the following fields:

Location

Location Details

Location	★ Science Park Bldg 25
Work Space	
Scheduled Weekly Hours	40

- ☐ **Location** – Enter the name of the new location, if appropriate.
 - The *Location* entered may change the Default Weekly Hours on the Details page
 - $\text{FTE} = \text{Scheduled Weekly Hours} / \text{Default Weekly Hours}$

- ☐ **Scheduled Weekly Hours** – Enter the number of weekly hours the person will be scheduled to work.

For most schools, full-term courses:
1 course = 13.32 hours
2 courses = 26.64 hours
3 courses = 40 hours (full time)

Sample of Job Change - Details

Start

Job

Location

Details

Organization

Compensation

The **Details** tab provides information such as:

Administrative

Employee Type	* Faculty
Time Type	* Part time
Pay Rate Type	Salary
Location Weekly Hours	40
Default Weekly Hours	40
FTE	87.5%

- If a worker's **FTE** falls below 100% due to a change in hours, you must also update the **Time Type** to reflect that the worker is now **Part Time**, and visa versa.

- Default Weekly Hours are always 40 for academic appointees.

Academic

Annual Work Period	5 Month AWP - August 9m (August 01 - December 31)
Work Period Percent of Year	55.56%
Disbursement Plan Period	* 5 Month DP - August (August 01 - December 31)

- The Annual Work Period (AWP) and Disbursement Plan Period (DPP) should align with the academic appointment dates for part-time faculty.

NOTE: Use the **"9M"** option for all teaching faculty.

Sample of Job Change - Compensation

Start

Job

Location

Details

Organization

Compensation

- If the FTE is less than 100%, Workday will calculate the *Prorated Amount*. This should match the amount to be paid.
- Frequency should always be “Annual”, never Monthly.

Compensation Plan
Academic Salary

Total Base Pay
0.00 - 1,000,000,000.00 USD Annual

Apply FTE%
☒

Amount *
72,289.16

Prorated Amount
60,000.00

Amount Change
-11,686.74

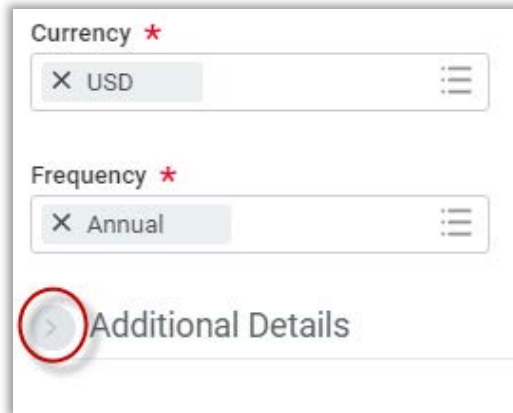
Percent Change
-13.92

Currency *
X USD

Frequency *
X Annual

Sample of Job Change - Compensation

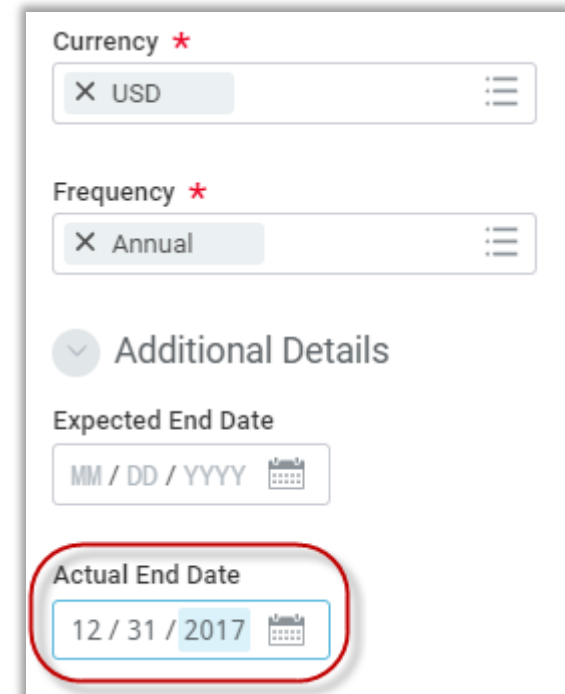
- For faculty with appointments that are less than 1 year, add the **Actual End Date**.
- This insures that the faculty member will not be paid beyond the end date unless reappointed with compensation.



Currency ★
X USD

Frequency ★
X Annual

> Additional Details



Currency ★
X USD

Frequency ★
X Annual

▼ Additional Details

Expected End Date
MM / DD / YYYY

Actual End Date
12 / 31 / 2017

Deleting Compensation


- It is not possible to enter “0” as the salary amount.
- To delete salary, click the “X” in the upper right corner of the Salary box.

Salary

Assignment Details
83,975.90 USD Annual (Prorated: 69,700.00)

Plan Name
Academic Salary

Effective Date
07/01/2016




Salary

Assignment Details
✗ 83,975.90 USD Annual (Prorated: 69,700.00) removed

Plan Name
✗ Academic Salary removed

Effective Date
✗ 07/01/2016 removed



TIPS AND IMPORTANT REMINDERS

Tips and Important Reminders

- ✓ Gather supporting documents which clearly state; (1) amount to be paid, (2) dates/period of work, and (3) describe the work being done or include the appointment rank.
NOTE: If this faculty member has multiple appointments, try to align the dates with the other units to keep changes to a minimum.
- ✓ Complete the [Faculty Compensation Approval Form](#) by referencing the supporting documents. This should be an exact match.
- ✓ Send all documents to faculty.admin@yale.edu, and, if secondary, to primary department.
- ✓ Enter transaction in Workday.

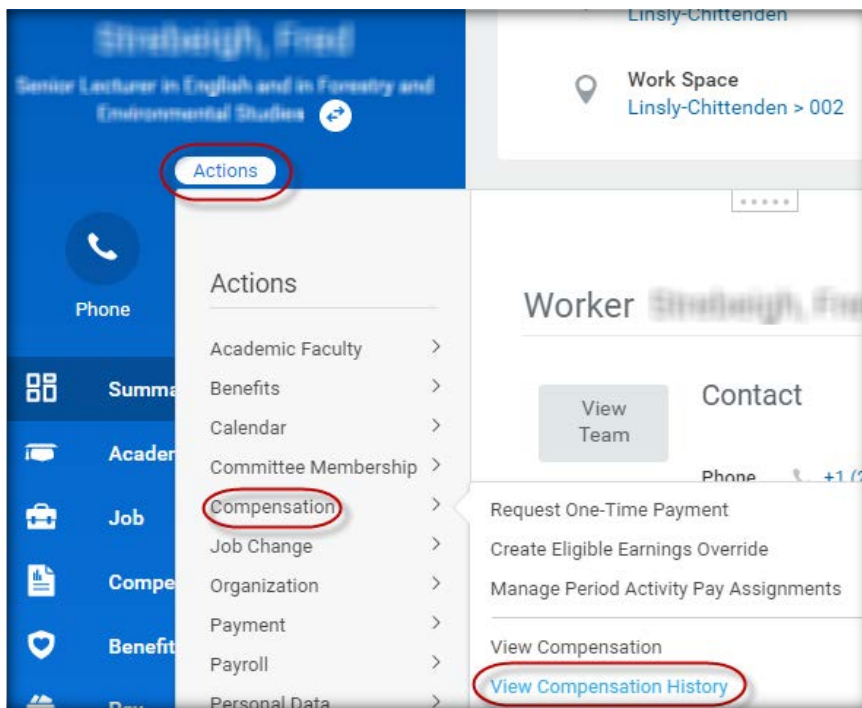
[illegible]

Tips and Important Reminders

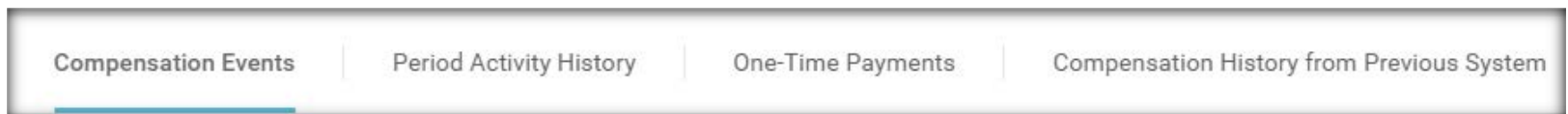
- Always include a comment to describe the event to the next approvers. Think from the perspective of the reader.
- Be sure to Submit your To-Do's to complete the transaction.
- Reasons codes matter!
 - They guide business processes and integrations.
 - They are used for reporting and analytics.
- For help with tracking business processes, run these reports:
 - *Business Process Transactions Awaiting Action by Role – Yale*
 - *My Business Processes in Flight – Yale*
- For help with checking compensation:
 - *Academic - Compensation Details - Yale*

Tips and Important Reminders

View Compensation History provides a view of all compensation related transactions that have ever been initiated.



The tabs below will only appear if there is relevant activity.



DEMO OF WORKSHEETS

- To access worksheets and additional information go to <https://facultyadmin.yale.edu/managing-compensation-faculty>.

Demo of Worksheets: Scenarios

Scenario 1: Rita James is a full-year, part-time tutor in the CTL. She is paid \$16,600 for the year and works an average of 11 hours per week. She is hired by CompLit to teach a course in the fall for \$8,250.

Scenario 2: Bob Baker is an unpaid professor adjunct in MCDB. He has been hired by Yale College to teach a course in the fall term for \$10,000. In late October, it is discovered that he was also hired retroactively to teach a course in Public Health for \$11,500.

Later in the fall, Bob is hired to co-teach a course in MBB in the spring for \$5,400.

RESOURCES

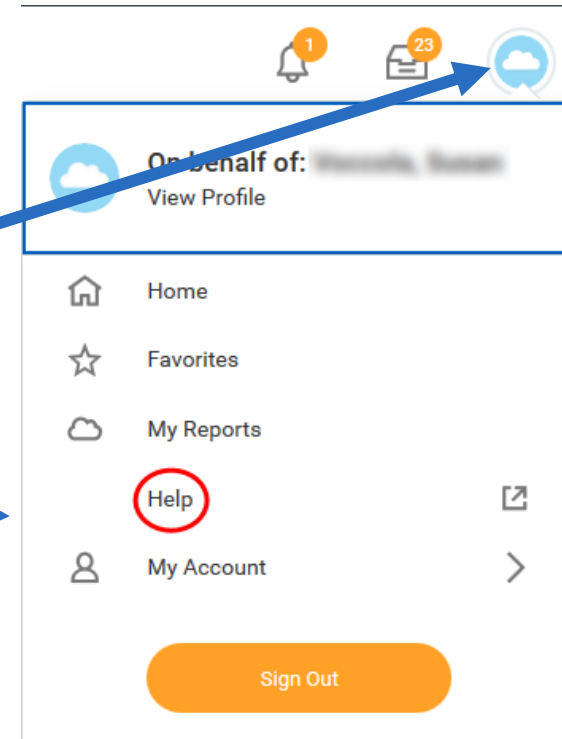
Workday@Yale Help Resources

Help resources are available for performing Workday-related tasks

- Training Guides
- Videos

To find help resources:

- From within Workday:
Click on the cloud icon, or your photo, in the upper-right corner and select “Help” to go to Workday@Yale training.
- Go directly to Workday@Yale training:
<http://workday.yale.edu/training>
- Contact Faculty Administrative Services:
 - Email: faculty.admin@yale.edu



Workday@Yale Help Resources

Top Tips for Workday Users

- <https://workday.yale.edu/top-tips-workday-users>

More Tips

- All transactions submitted in Workday are permanently stored in the system and can be found from the Search box.
 - **Tip:** Select a category from the left menu to limit the results.
- All transactions submitted on an employee record can be accessed by going to the Worker History.
 - **Tip:** Click the button, “View Worker History by Category” to view transactions in related groupings.
 - **Tip:** View all compensation transactions for an employee by clicking Actions, hovering over Compensation, and selecting “View Compensation History.”

Workday@Yale Help Resources

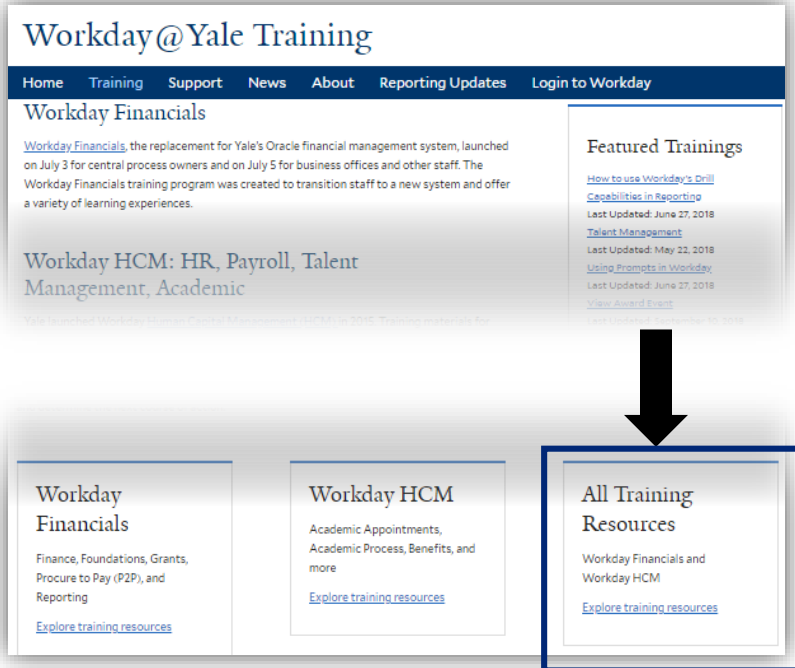
Top Guides for Compensation Transactions

- [*Manage Compensation \(Academic\)*](#) – This guide is to be used for completing the following tasks for academic appointees:
 - Request Compensation Change
 - Request One-Time Payment
 - View Compensation Change or One-Time Payment Request
 - Correct your Compensation Change or One-Time Payment Request
- [*Change Job: Work Week FTE/Location*](#) – Walks you through the steps required to change someone's work week hours and FTE.
- [*Assign Payroll Costing Allocation*](#) – Provides instructions for updating salary charging, especially useful for faculty with multiple assignments.
- [*Hire Faculty Process*](#) – Walks you through the entire business process for hiring a new faculty member, including the addition of compensation.

Workday@Yale Help Resources

Tip for finding guides

- On the main Workday @ Yale Training site, scroll down the page to the box, All Training Resources, and click the link.
- This will bring you to the full library of guides.
- Select the Human Capital Management tab to filter on all guides related to employee record transactions.
- Then, you may either scroll through the list to find the appropriate guide, or use the filters to limit the results.



All Training Resources

Search by Category:

Search by Keyword: