Office of Faculty Administrative Services (OFAS)

March 2020
<table>
<thead>
<tr>
<th>Frequency</th>
<th>Report Name</th>
<th>Who should run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly, or as needed</td>
<td>My Business Processes in Flight – Yale</td>
<td>Any initiator</td>
</tr>
<tr>
<td>Monthly</td>
<td>Payroll Results Comparison – Yale</td>
<td>Business Partner (BP)</td>
</tr>
<tr>
<td>Monthly</td>
<td>Academic - Expiring Appointments – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic - Compensation Details – Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic QA - Expired Current Appointments – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic QA - Missing Degrees - Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Contingent Workers with Expiring Contracts - Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Employees on Leave, by Academic Unit</td>
<td>Academic HR Support Specialist (AHRSS)</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Ladder Faculty Review – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Non-Ladder Faculty Review – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually</td>
<td>Supervisory Organization Details - Yale</td>
<td>BP or AHRSS</td>
</tr>
</tbody>
</table>
My Business Processes in Flight – Yale

Frequency: Monthly, or as needed
Run by: Anyone who initiates transactions

Provides the status of transactions that you submitted and are still pending approvals.
Payroll Results Comparison – Yale

Frequency: Monthly
Run by: Business Partner

Good for checking that expected changes have taken place, as well as checking for unexpected changes or problems that need investigation.
Academic – Expiring Appointments – Yale

Frequency: *Monthly*
Run by: *Appointments and Promotions Specialist*

Run this report to list faculty who may need to be reappointed or may need to be terminated.

Provost’s Office perspective: All faculty who are not being reappointed within one year must be terminated.

### Academic - Expiring Appointments - Yale

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions</td>
<td>View Academic Appointments expiring within a given date range. (Default: today through the end of the next calendar month). Displays Academic Unit, Appointee, Tenure Status, Track, and Rank. Report includes Academic Affiliates. Sorted by Academic Unit, Track Type, Rank, then Academic Appointee.</td>
</tr>
<tr>
<td>Academic Structure Node</td>
<td></td>
</tr>
<tr>
<td>Academic Unit</td>
<td></td>
</tr>
<tr>
<td>Academic Track Type Category</td>
<td></td>
</tr>
<tr>
<td>Academic Rank</td>
<td></td>
</tr>
<tr>
<td>Appointment Type</td>
<td></td>
</tr>
<tr>
<td>Appointment Expires On or After</td>
<td>04/01/2020</td>
</tr>
<tr>
<td>Appointment Expires On or Before</td>
<td>08/01/2020</td>
</tr>
</tbody>
</table>
**Academic - Compensation Details – Yale**

**Frequency:** *Bi-Annually, each term*

**Run by:** *Business Partner*

- Good for checking that individuals will be paid correctly.
- Can be used to check Annual Work Periods (AWP) Disbursement Plan Periods (DPP) and end dates on the various compensation plans.

**Note:** OFAS tries to check for end dates on all faculty whose DPP’s are less than 12 months.
- To insure that benefits drop if applicable.
- To insure that compensation does not resume unless approved and resubmitted.
Academic QA - Expired Current Appointments – Yale

Frequency: *Bi-Annually, each term*
Run by: *Appointments and Promotions Specialist*

Provost’s Office perspective: All faculty who are not being reappointed within one year must be terminated.

- Enter *Appointment Expires On or After 6/1/2010* and *Appointment Expires On or Before* [current date]
- Consult chair or dean to determine which faculty are not returning, then terminate those who are not.
- NOTE: Never end a primary appointment, else the individual will drop off of all academic reports. If the individual is not being reappointed, you need to terminate from the employee record.

For proper instructions on terminating faculty, reference the Workday guides in the “Termination/Separation” section ([http://workday.training.yale.edu/](http://workday.training.yale.edu/))
Academic QA - Expired Current Appointments – Yale

Example of prompts

Academic QA - Expired Current Appointments - Yale

Instructions
This report lists those Academic Appointees having a current appointment with an Appointment End Date in the past. Includes all Academic Affiliates and Academic Appointees (even if inactive).

* Note: The default date range of appointment end date is between today and 30 days ago.

Academic Structure Node
Academic Unit
Track Type Category
Academic Rank
Appointment Type
Appointment Expires On or After
Appointment Expires On or Before
EXCLUDE Academic Structure Node
EXCLUDE Supervisory Organization
**Academic QA - Missing Degrees - Yale**

**Frequency:** *Bi-annually, each term*

**Run by:** *Academic HR Support Specialist*

- Checks for faculty who are missing degree information
- Incredibly important for a variety reasons, such as
  - Institutional reporting, e.g. U.S. News and World Report
  - Accreditation process

**Recommended order of run:**
- Run ladder faculty (*Track Type Category = Ladder*)
- Run for teaching faculty
  - *(TTC = Non-ladder Teaching and Professional Practice)*
- Run for research faculty and postdocs
  - *(TTC = Research and Training)*
Example of prompts
Contingent Workers with Expiring Contracts – Yale

Frequency: *Bi-annually, each term, or monthly if high volume*
Run by: *Business Partner*

Run for the highest supervisory org to which you have access. This is either your school dean or department chair.

- The default date is the last day of the next month, but this can be changed to a later date if you wish to anticipate future expiring contracts.
Instructions for ending contracts from this report

1. From the list of results, right click on a contingent worker.

2. From the pop-up menu, select “See in New Tab” to open the record in a new window. This will preserve your report results.
3. Click on the Actions button under the Business Title.

4. Hover over Job Change and select “End Contingent Worker Contract.”
5. The contract end date will default to the last day of the contract. There’s no need to change this unless a different date is known.

6. The reason code defaults to the only option.

7. Click Close Position.

8. Click Submit to commit the action.
Contingent Workers with Expiring Contracts – Yale

Instructions for ending contracts from this report

Run for the highest supervisory org to which you have access. This is either your school dean or department chair.

• Enter dates of *On Leave Between 7/1/20 And 6/30/21.*

• Verify the list of faculty on leave.

• Refer to the Workday guide, *Leave of Absence: Absence/Relief Time – Academic (Time Off),* if you need to return faculty from a leave or place them on leave.

  **Note:** If you need to place them on leave, verify that you have submitted the necessary supporting documents to OFAS.
Run for the highest supervisory org to which you have access. This is either your school dean or department chair.

- Enter dates of *On Leave Between 7/1/20 And 6/30/21*.
- Verify the list of faculty on leave.
- Refer to the Workday guide, *Leave of Absence: Absence/Relief Time – Academic (Time Off)*, if you need to return faculty from a leave or place them on leave.

**Note:** If you need to place them on leave, verify that you have submitted the necessary supporting documents to OFAS.
### Academic - Employees on Leave, by Academic Unit – Yale

- **Employee Type**: Faculty, Other Academic
- **Academic Structure Node (Primary Appt)**: 
- **Academic Unit (Primary Appt)**: 
- **Track Type Category (Primary Appt)**: 
- **Appt Type (Primary Appt)**: 
- **Organizations**: Law School: Dean, Gerken, Heather, Kristin
- **Include Subordinate Organizations**: 
- **Appointee**: 
- **Leave Type (Including Family)**: 
- **Leave Request Status**: 
- **Include Leave Requests Pending Approval**: 
- **On Leave Between**: 09/01/2020
- **And**: 10/01/2021