Postdocs & Workday

Part I: The Hiring Process
Part II: Reappointments & More

Office for Postdoctoral Affairs
September, 2015
Workday is Different

“Fill my eyes with that double vision
No disguise for that double vision”
- Foreigner 1978

Workday requires you to think and see in double vision.
All Academics are in Double Vision

Position (Job)
- Title
- Org
- Compensation

Academic Appointment
- Rank
- Academic Unit
- Appt start/end dates
Part I: The Hiring Process

1. Postdoc/Postgrad Fellows & Associates

2. Laboratory Associates & Visiting Fellows

‘Contingent Workers’
Flow Chart for Postdoc/Postgrad Hires

1. Dept creates req
2. Dept reviews/approves
3. Dept receives email to finish req in STARS
4. Dept finishes req
5. Dept reviews/approves
6. OPDA reviews/approves
7. OPDA opens/posts
8. Dept receives email confirming posting
9. Dept contacts candidate
10. Candidate applies
11. OPDA reviews candidate profile
12. OPDA starts background check
13. OPDA creates New Hire Form & Hires
14. Candidate receives hire letter
15. OPDA confirms hire is in WD
16. netID is generated
Begin the Postdoc Process in Workday

1. Dept creates req
2. Dept reviews/approves
3. Dept receives email to finish req in STARS

Use this guide:

Create Job Requisition: Postdocs (STARS)
Select Correct Supervisory Org

Create Job Requisition

For more information about the process of creating a job requisition or the list of values training website.

Copy Details from Existing Job Requisition

Supervisory Organization

Create New Position

For Existing Position

Worker Type

Select ‘Employee’
Select Correct Reason Code, Recruit Date

**Recruiting Start Date:** Choose today’s date or a date in the past. Do not choose a date in the future.

**Target Hire Date:** This is the earliest date the selected candidate can start. It may be different from the Recruiting Start Date.

**Reason:** For staff positions, only choose a grant funded reason if the position is funded by a grant.

Recruiting Information

<table>
<thead>
<tr>
<th>Recruiting Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Openings: 1</td>
</tr>
<tr>
<td>Reason: search</td>
</tr>
<tr>
<td>Replacement For: search</td>
</tr>
<tr>
<td>Recruiting Instruction: select one</td>
</tr>
<tr>
<td>Recruiting Start Date: 08/01/2015</td>
</tr>
<tr>
<td>Target Hire Date: 10/01/2015</td>
</tr>
</tbody>
</table>

- Recruiting Start Date is today or earlier
- Select Correct Reason Code
- Select this Reason Code

Select Postdoc Requisition (STARS) > Change in Funding: Postdoctoral Hire
Candidate sees this field!
Write in ONLY one of these titles:
- Postdoctoral Associate
- Postdoctoral Fellow
- Postgraduate Associate
- Postgraduate Fellow
Job Details are Important

Leave blank

Don’t touch this!

Leave blank

Select ‘Other Academic’
You will be contacted after Req is Approved

Auto-generated Message:

“Your requisition -- 33456WD (P233659), Postdoctoral Associate -- has been approved in Workday…

…STARS Job Posting 32951BR has been created….

…click on the link below…”
Flow Chart for Postdoc/Postgrad Hires

1. Dept creates req
2. Dept reviews/approves
3. Dept receives email to finish req in STARS
4. Dept finishes req
5. Dept reviews/approves

Finalize STARS Job Posting: Other Academic (Postdoc)
STARS Req has 4 Parts

1. Select the type of Requisition
   * What type of requisition is this?
     - Staff
     - Staff Local 35
     - Temporary/Casual
     - Other Academic
     - Intern/Non-Yale Student (Temp Only)

Select “Other Academic” →

(Can’t alter)

2. Workday Requistion Fields (Non-Editable)
3. STARS Job Posting Information
4. Complete for Postdoc/Postgrad Hires
3. STARS Job Posting Info section is Important

Candidate sees this field

Select “40”
**STARS Job Posting Info section is Important**

3.

Allowance = $$ not paid through Yale

Always full PTAEO

Must include %
Select a Reviewer & Approver

YSM: Davi, Abby
Central: Paradise, Alisa
Enter Compensation Carefully

4. Complete for Postdoc/Postgrad Hires

<table>
<thead>
<tr>
<th>Name of Person Hired</th>
<th>John Doe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>01 SEP 2015</td>
</tr>
<tr>
<td>Duration of Appointment</td>
<td>renewable for additional years up to th</td>
</tr>
</tbody>
</table>

*Total Yale Compensation (Example 50000.00)*

| 44556.00 |

*Annual Salary (Example 50000.00)*

| 44556.00 |

*If not paid through Yale: must enter 0

= monthly $$ pd via Yale

x # months

= monthly $$ pd via Yale

x 12
Key fields: Health Coverage & Academic Unit

4. Select ONLY: External or Yale

Select the correct Unit

Specify health coverage
- N/A
- External
- Yale

Academic Track Type
- Training

Academic Rank
- Postgraduate Fellow

Academic Start Date
- 01 JUL 2015

Academic End Date
- 30 JUN 2016

Identifier Type
- P - Primary

Academic Unit
- Infectious Disease

Reason for Adding academic Appointment
- Add Academic Appointment > Initial Appointment
Flow Chart for Postdoc/Postgrad Hires

4. Dept finishes req
5. Dept reviews/approves
6. OPDA reviews/approves
7. OPDA opens/posts
You will be contacted after Req is posted

Auto-generated Message:

“The requisition...been opened and posted.

Please direct the candidate to apply to this requisition number.

Candidate Name
32951BR...”
Flow Chart for Postdoc/Postgrad Hires

4. Dept finishes req
5. Dept reviews/approves
6. OPDA reviews/approves
7. OPDA opens/posts
8. Dept receives email confirming posting
9. Dept contacts candidate
10. Candidate applies
11. OPDA reviews candidate profile
12. OPDA starts background check
13. OPDA creates New Hire Form & Hires
14. Candidate receives hire letter

How do you know the status?
‘Postdoc Req Status’ + ‘Notes’ Inside Reqs

Complete for Postdoc/Postgrad Hires

Name of Person Hired: John Doe

Start Date: 01 SEP 2015

Duration of Appointment: not renewable beyond the current

Total Yale Compensation (Example 50000.00): 50000.00

Annual Salary (Example 66666.66): 66666.66

Select the nation in which this work will primarily take place: United States

Specify health coverage Source: Yale

Academic Track Type: Training

Academic Rank: Postdoctoral Associate

Academic Start Date: 01 SEP 2015

Academic End Date: 31 MAY 2016

Identifier Type: P – Primary

Academic Unit: MacMillan Center

Reason for Adding academic Appointment: Add Academic Appointment > Init

Postdoc Req Status: N/A

Postdoc Notes: bgck initiated 8/25
<table>
<thead>
<tr>
<th>Select a Req</th>
<th>Postdoc Notes</th>
<th>Date Created</th>
<th>Start Date</th>
<th>Postdoc Req Status</th>
<th>Req folder</th>
<th>Name of Person Hired</th>
<th>Postl option ID</th>
<th>WD Requisition</th>
<th>STARS Requisition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>bgck initiated 8/7 - requested degree 8/10</td>
<td>09-Jul-2015</td>
<td>15-Sep-2015</td>
<td>Ret’d to Candidate</td>
<td>XXXXXXXXXX</td>
<td>32666WD</td>
<td>32504BR</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>09-Jul-2015</td>
<td>01-Sep-2015</td>
<td>N/A</td>
<td>XXXXXXXXXX</td>
<td>32664WD</td>
<td>32503BR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>bgck initiated 8/4</td>
<td>09-Jul-2015</td>
<td>01-Sep-2015</td>
<td>Waiting for bgck</td>
<td>XXXXXXXXXX</td>
<td>32595WD</td>
<td>32492BR</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kathy working on - did not get into workday 8/11/15</td>
<td>08-Jul-2015</td>
<td>01-Aug-2015</td>
<td>Postdoc Hired</td>
<td>XXXXXXXXXX</td>
<td>32571WD</td>
<td>32484BR</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Some Hires Require an Escort into Workday

1. OPDA finishes request
2. Dept reviews/approves
3. OPDA reviews/approves
4. Dept opens/posts
5. Dept receives email confirming position
6. Dept contacts candidate
7. Candidate applies
8. OPDA reviews candidate profile
9. OPDA starts background check
10. OPDA creates New Hire Form & Hires
11. Candidate receives hire letter
12. OPDA confirms hire is in WD
13. netID is generated

HHMI hires:
Call us to provide SSN, DOB
Postdoc/Postgrad Hires use Workday + STARS

1. Postdoc/Postgrad Fellows & Associates

LA/VF Hires use only Workday

2. Laboratory Associates & Visiting Fellows

‘Contingent Workers’
Flow Chart for Hiring LA/VF

1. Submit Application & CV to Postdoctoral Affairs (at least 1-2 months in advance)

2. If application approved, apply for visa

3. Enter into Workday

4. Submit signed appointment letter, proof of funding, proof of health to Postdoctoral Affairs
Hiring LA/VF Requires 2 Distinct Processes

Position (Job)
Create Job Requisition:
Academic Contingent Worker

Academic Appointment
Academic:
Managing Appointments

Start Here
Creating & Filling Position Takes 3 Steps

Create Job Requisition:
Academic Contingent Worker

1. Create a pre-hire (name, contact info)*
2. Create Workday req (org, position title)
3. Contract contingent worker (put the pre-hire into the job req)

* Skip this step if person already exists in Workday
‘Create Pre-Hire’ Screens are Straightforward

Add degree info on next screen
’Create Job Req’ is Similar to Postdoc Process

Create Job Requisition

For more information about the process of creating a job requisition or the list

Copy Details from Existing Job Requisition

Supervisory Organization

Dept

Faculty mentor

Do NOT select ‘Employee’
‘Create Job Req’ is Similar to Postdoc Process

Select ‘New Other Academic’

Recruiting Start Date is today or earlier
Create Job Req’ is Similar to Postdoc Process

Write in ONLY one of these titles:
Laboratory Associate
Visiting Fellow
‘Create Job Req’ is Similar to Postdoc Process

Job

Job Details

Job Posting Title  
Laboratory Associate

Justification

Leave blank

Job Profile  
Laboratory Associate

Job Description Summary

Leave blank

Job Description

Leave blank

Job Families for Job Profile  
Training

Worker Sub-Type  
Other Academic

Time Type  
Full time

Primary Location  
search

Additional Locations  
(empty)

Scheduled Weekly Hours  
0

Work Shift  
(empty)

Select ‘Other Academic’
‘Contract Contingent Worker’ Ties Pre-Hire to Req

Create Job Requisition:
Academic Contingent Worker

Pg. 5 “Enter National ID Type” → use only U.S. Social Security #

If no U.S. SSN, request dummy # from Employee Service Center
Recap: 3 Steps to Contingent Worker Position

1. Create a pre-hire (name, contact info)
2. Create Workday req (org, position title)
3. Contract contingent worker (put the pre-hire into the job req)
Don’t Forget to Add Academic Appointment

Position (Job)
Create Job Requisition:
Academic Contingent Worker

Academic Appointment
Academic:
Managing Appointments
Fields that cause problems:
Track: Select ‘Academic Affiliate’
Reason Code: Select ‘Add Academic Appointment’
Recap: The Hiring Process

1. Postdoc Fellows & Associates
   - Create Job Requisition: Postdocs (STARS)
   - Finalize STARS Job Posting: Other Academic (Postdoc)

2. Laboratory Associates & Visiting Fellows
   - Create Job Requisition: Academic Contingent Worker
   - Academic: Managing Appointments
Part II: Reappointments & More

1. Reappointments
2. Terminations
3. Tricky stuff
4. Reports to know
Reappointing Postdocs Requires Double Vision

Position (Job)
Manage Compensation (Academic)

Academic Appointment

To-Do reminder

Start Here

Academic: Managing Appointments
‘Update Academic Appointment’

Academic:
Managing Appointments pgs 3-4

Field that causes problems:
**Reason Code:** Select ‘Standard Reappointment with Compensation Change’

This is the **ONLY** Reason Code to trigger the process to update the compensation.
‘Request Compensation Change’

Manage Compensation (Academic)  pgs 1-3

Field that causes problems:
Reason Code:  Select ‘Academic Reappointment’
Terminating Postdocs Requires Double Vision

Position (Job)
Termination/Separation:
Employee (Academic)

Start Here

Academic Appointment
Academic:
Managing Appointments

To-Do reminder
‘Terminate Employee (Academic)’

Termination/Separation:
Employee (Academic)

Field that causes problems:

**Reason Code:** ‘Resignation’ – provide letter from appointee
OR
‘Employment Period Ended’ – no documentation necessary
‘End Academic Appointment Track’

Academic:
Managing Appointments pg 4

Field that causes problems: none
If You Process 1 Part and Forget the Other

Position (Job)
Forget to terminate: Postdoc gets paid

Academic Appointment
Forget to end: Appointee shows up as active in your dept
Terminating LA/VF is Different

Position (Job)

Termination/Separation:
Contingent Worker

Start Here

NO To-Do

Academic Appointment

Academic:
Managing Appointments
Tricky Stuff in Workday

• If a Start Date changes for a new hire already in Workday, do NOT attempt to fix. Contact us.

• If place appointee on leave of absence, must remember to Request a Return from LOA. Use Leave of Absence: Academic (Time Off)

• PDA-PDF transitions require double vision (and 2 guides)
Position (Job)
Change Job:
Convert PDA to PDF (Academic)

To-Do reminder

Academic Appointment
Academic:
Managing Appointments

Start Here
PDA-PDF Transition: 1. Update Academic Appointment

Field that causes problems:
Reason Code: Select ‘Change of Appointment Details > Fellow/Associate Rank’
PDA-PDF Transition: Change Job

Change Job:
Convert PDA to PDF (Academic)

Field that causes problems:
Compensation Plan:
  For PDFs - Select ‘PDF Stipend’
  For PDAs - Select ‘Academic Salary’

For PDFs only: Send us documentation of the funding
Reports Provide a Global View & Help Spot Errors

‘Academic – Expiring Appointments’

‘Academic QA – Expired Current Appointments’
Report #1: ‘Academic – Expiring Appointments’

Academic - Expiring Appointments - Yale

Instructions: View Academic Appointments expiring within a given date range | Default: today through today. Displays Academic Unit, Appointee, Tenure Status, Track, and Rank. Report includes sorted by Academic Unit, Track Type, Rank, then Academic Appointee.

<table>
<thead>
<tr>
<th>Academic Structure Node</th>
<th>search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Unit</td>
<td>search</td>
</tr>
<tr>
<td></td>
<td>× Foresty and Environmental Studies</td>
</tr>
<tr>
<td>Academic Track Type Category</td>
<td>search</td>
</tr>
<tr>
<td>Academic Rank</td>
<td>search</td>
</tr>
<tr>
<td></td>
<td>× Laboratory Associate</td>
</tr>
<tr>
<td></td>
<td>× Postdoctoral Associate</td>
</tr>
<tr>
<td></td>
<td>× Postdoctoral Fellow</td>
</tr>
<tr>
<td></td>
<td>× Postgraduate Associate</td>
</tr>
<tr>
<td></td>
<td>× Postgraduate Fellow</td>
</tr>
<tr>
<td></td>
<td>× Visiting Fellow</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointment Type</th>
<th>search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Expires On or After</td>
<td>10/01/2015</td>
</tr>
<tr>
<td>Appointment Expires On or Before</td>
<td>10/31/2015</td>
</tr>
</tbody>
</table>

Your Unit: [Select your unit] (e.g., Forestry and Environmental Studies)
Rank(s) of interest: [Select rank(s)] (e.g., Laboratory Associate, Postdoctoral Associate)
Upcoming month: [Select date range] (e.g., 10/01/2015 to 10/31/2015)
Report #2: ‘Academic QA – Expired Current Appointments’

Academic QA - Expired Current Appointments - Yale

<table>
<thead>
<tr>
<th>Instructions</th>
<th>This report lists those Academic Appointees having a current appointment who includes all Academic Affiliates and Academic Appointees (even if inactive).</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Academic Structure Node</th>
<th>search</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Academic Unit</th>
<th>search</th>
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</thead>
<tbody>
<tr>
<td>Forestry and Environmental Studies</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Track Type Category</th>
<th>search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training</td>
<td>✗</td>
</tr>
<tr>
<td>Academic Affiliation</td>
<td>✗</td>
</tr>
</tbody>
</table>

Your Unit: ‘Training’ = PDs + PGs (+ Clinical Fellows)

‘Academic Affiliation’ = LAs + VFs (+ others)
Workday is Different

As foreigners, use the guides (and these slides)

Think & see in double vision

Run reports to be in the know