Postdocs & Workday

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

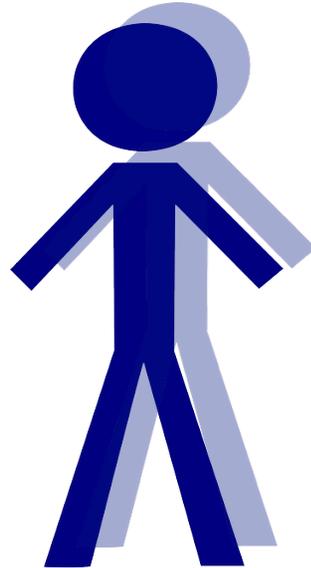YALE UNIVERSITY
Y
Postdoctoral Affairs

Office for Postdoctoral Affairs
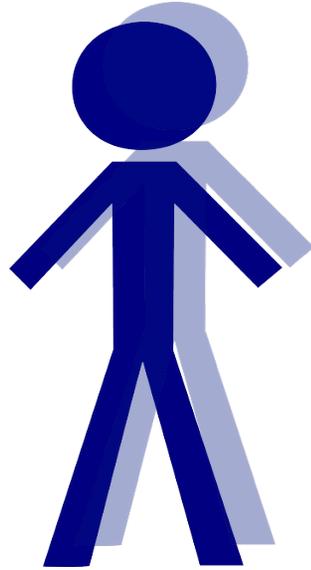September, 2015

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
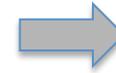
1. Postdoc/Postgrad Fellows & Associates

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

Select Correct Reason Code, Recruit Date

Start | **Recruiting Infor...** | workday. ⇒ | Qualifications | Summary

Recruiting Start Date: Choose today's date or a date in the past. Do n̶
Target Hire Date: This is the earliest date the selected candidate can st̶
Reason: For staff positions, only choose a grant funded reason if the po̶

Recruiting Information

Recruiting Details

Number of Openings	1	
Reason ＊	search	📋
Replacement For	search	📋
Recruiting Instruction	select one	▼
Recruiting Start Date ＊	08/01/2015	📅
Target Hire Date ＊	10/01/2015	📅
Target End Date	__/__/____	📅

search 🔍

Top > Create Job Requisition > Postdoc Requisition (STARS)

Postdoc Requisition (STARS) > Change in Funding

Postdoc Requisition (STARS) > Postdoctoral Hire

Select this Reason Code

Recruiting Start Date is <u>today or earlier</u>

Job Details

Job Posting Title	*	Postdoctoral Associate
Justification		
Job Profile	*	Postdoctoral Associate
Job Description Summary		Postdoctoral Associate
Job Description		
Job Families for Job Profile		Training
Worker Sub-Type	*	Other Ac
Time Type	*	Full time
Primary Location	*	Sterling
Additional Locations		search
Scheduled Weekly Hours		40
Work Shift		(empty)

Job Details are Important

workday. ⇒ ★ ⇒ workday.

Candidate sees this field!
Write in ONLY one of these titles:

Postdoctoral Associate

Postdoctoral Fellow

Postgraduate Associate

Postgraduate Fellow

Job Details

Job Details are Important

Job Posting Title * `Postdoctoral Associate`

Justification

Leave blank

Job Profile * `Postdoctoral Associate`

Job Description Summary `Postdoctoral Associate`

Don't touch this!

Job Description

Leave blank

Job Families for Job Profile *Training*

Worker Sub-Type * `Other Academic` ← Select 'Other Academic'

Time Type * `Full time`

Primary Location * `Sterling Hall Of Medicine - I Wi`

Additional Locations `search`

Scheduled Weekly Hours `40`

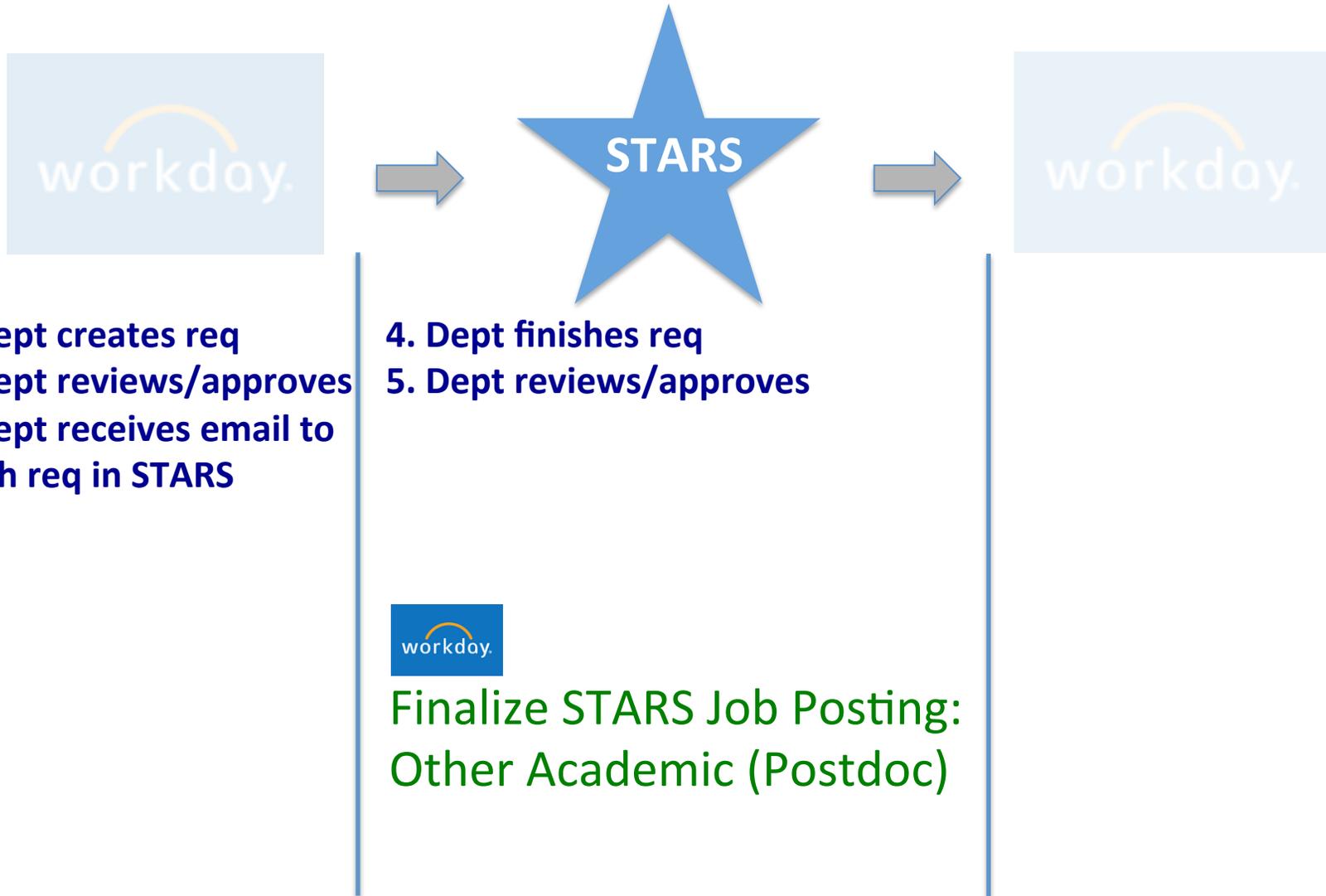Work Shift (empty)

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

STARS

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 Requisition Fields (Non-Editable)**

3. ▶ **STARS Job Posting Information**

4. ▶ **Complete for Postdoc/Postgrad Hires**

   ▶

   ▶

STARS *Job Posting Info* section is Important

workday ⇒ STARS ⇒ workday

3.

STARS Job Posting Information

Postition Requirements – The following fields may appear on the job posting.

* **Posting Position Title:** Postgraduate Fellow

* **Primary Departmental Contact:** Moore-Potter : Rachel

* **Primary Contact Email Address:** rachel.moore-potter@yal

* **Primary Contact Phone Number:** 203-737-4166

* **Position Focus:**
> The trainee is a research associate in Dr. Zhengfan Jiang's lab in Peking University, and is working on the regulation of Rig-I mediated antiviral signaling

Candidate sees this field

Allowance 1: Non-Yale Compensation–Other

Allowance Amount 1: 28800.00

Allowance 2:

Allowance Amount 2:

Additional Position Information

* **Select the state in which this work will primarily take place.** Connecticut

* **Home Organization Number:** MIMMU Research 707103

* ...cation: Medical School Campus

...Phone ...umber:

* **University Mail Code:** 161-Immunobiology

Position Duration & Work Schedule

Time Type Full time

Scheduled Weekly Hours(Total # of hours to be worked:) 40

Select "40"

* **Full Time Equivalent:** 40.0

Labor Schedule & Other Business Office Information

* **PTAEO 1 (Click here to Validate PTAEO.):** 0031642.00.0001AM.711950.707001

STARS *Job Posting Info* section is Important

3.

Email Address:

* Primary Contact Phone Number: 203-737-4166

* Position Focus: The trainee is a research

Allowance = $$ not paid through Yale

Allowance 1 Non-Yale Compensation–Other

Allowance Amount 1 28800.00

Allowance 2

Allowance Amount 2

Allownace 3

Allowance Amount 3

Worksite Phone Number:

* University Mail Code: 161-Immunobiology

Position Duration & Work Schedule

Time Type Full time

Scheduled Weekly Hours(Total # of hours to be worke 40

* Full Time Equivale...

Labor Schedule & Other Business Office Information

* PTAEO 1 (Click here to Validate PTAEO.): 0031642.00.0001AM.711950.707001

Always full PTAEO

* Percentage 1 0
(###.##):

Must include %

Select a Reviewer & Approver

workday → STARS → workday

3.

Final Department Reviewer

*Final Department Reviewer — Moss, Debra   09-Jul-2015

*STARS Final Approver — Davi, Abby   16-Jul-2015   ←

*Notify upon approval completion — Req Gatekeeper, Req Gatekeeper

YSM: Davi, Abby
Central: Paradise, Alisa

Enter Compensation Carefully

workday ⇒ STARS ⇒ workday

4.

Complete for Postdoc/Postgrad Hires

Name of Person Hired | John Doe

Start Date | 01 ▲▼ | SEP ▲▼ | 2015 ▲▼

Duration of Appointment | renewable for additional years up to th ▲▼

*Total Yale Compensation (Example 50000.00) ⓘ | 44556.00 ⟵   = monthly $$ pd via Yale
x # months

*Annual Salary (Example 50000.00) | 44556.00 ⟵   = monthly $$ pd via Yale
x 12

Select the nation in which this work will primarily take place |

*If not paid through Yale: must enter 0

Key fields: Health Coverage & Academic Unit

workday ⇨ STARS ⇨ workday

4.

Specify health coverage	○ N/A
Source:	● External
	○ Yale

Select ONLY:
External or 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 ⬍

Select the correct Unit

Academic Unit Infectious Disease ⬍

Reason for Adding academic Appointment Add Academic Appointment > Initial Appointm ⬍

Flow Chart for Postdoc/Postgrad Hires

STARS

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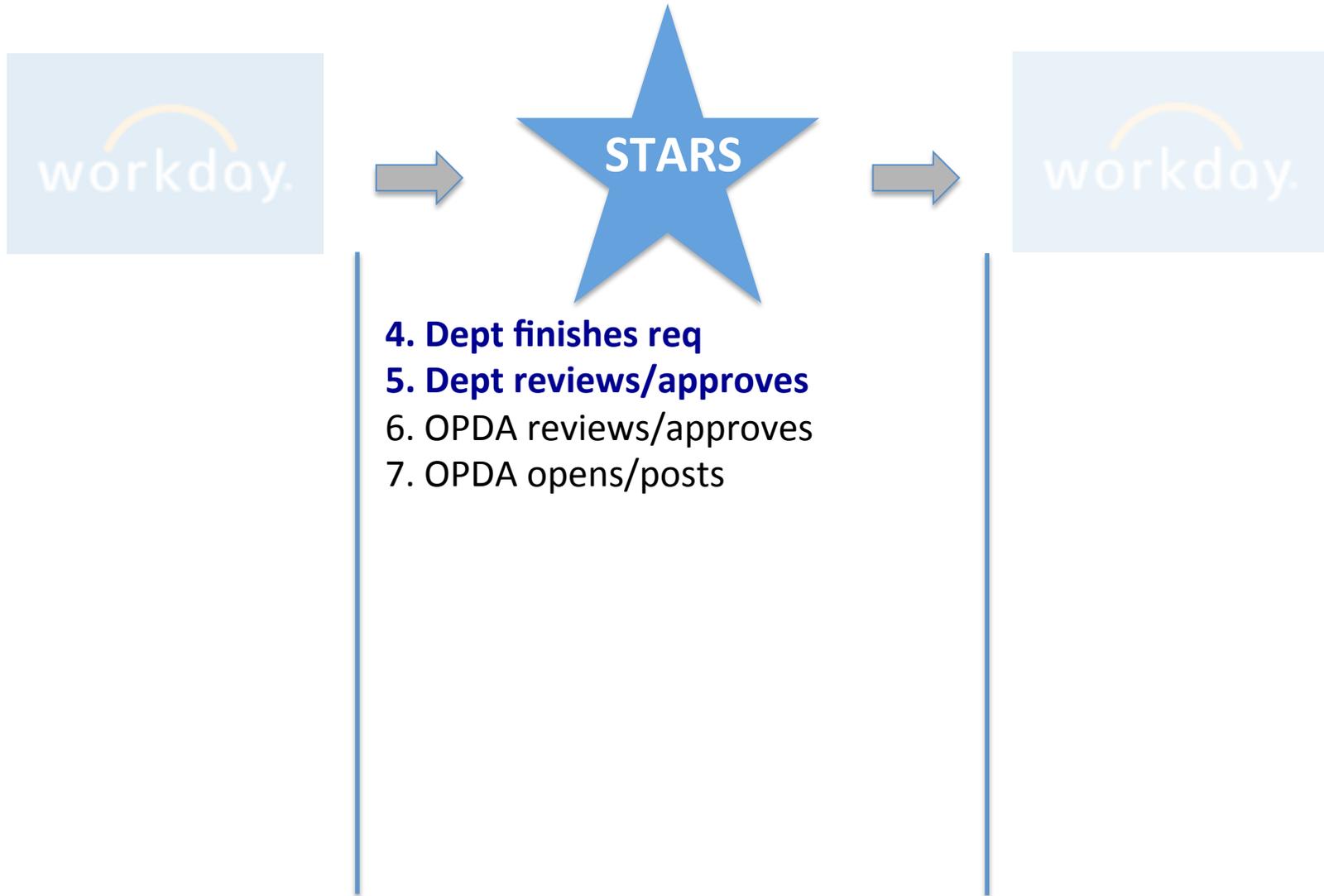
You will be contacted after Req is posted

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

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

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 50000.00) | 66666.66

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

Specify health coverage Source: | ◯ N/A ◯ External ◉ 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 > Initi ▲▼

Postdoc Req Status
- ◯ N/A
- ◯ Awaiting OPDA Director Review
- ◯ Postdoc Hired
- ◯ Profile Complete
- ◯ Ret'd to All
- ◯ Ret'd to Candidate
- ◯ Ret'd to Dept
- ◉ Waiting for bgck

Postdoc Notes | bgck initiated 8/25

'Postdoc Req Status' + 'Notes' on Main Screen

Show Results 51-100 ⇕				|<< < Showing reqs 51-100 of 120 > >>|				

lish (US)   View search criteria   Sort options   Edit output fields   Save output fields
Refine search

Select a Req	Postdoc Notes ⇕	Date created ⇕	Start Date ⇕	Postdoc Req Status ⇕	Req folder ⇕	Name of Person Hired ⇕	Postin option ⇕	WD Requsition ID ⇕	STARS Requisition ⇕
◯	bgck initiated 8/7 - requested degree 8/10	09-Jul-2015	15-Sep-2015	Ret'd to Candidate	📁	XXXXXXXXX	📌	32666WD	32504BR
◯		09-Jul-2015	01-Sep-2015	N/A	📁	XXXXXXXXX	📌	32664WD	32503BR
◯	bgck initiated 8/4	09-Jul-2015	01-Sep-2015	Waiting for bgck	📁	XXXXXXXXX	📌	32595WD	32492BR
◯	Kathy working on - did not get into workday 8/11/15	08-Jul-2015	01-Aug-2015	Postdoc Hired	📁	XXXXXXXXX	📌	32571WD	32484BR

Some Hires Require an Escort into Workday

STARS

15. OPDA confirms hire is in WD

16. netID is generated

<u>HHMI hires:</u>
Call us to provide
SSN, DOB

13. OPDA creates New Hire Form & Hires

14. Candidate receives hire letter
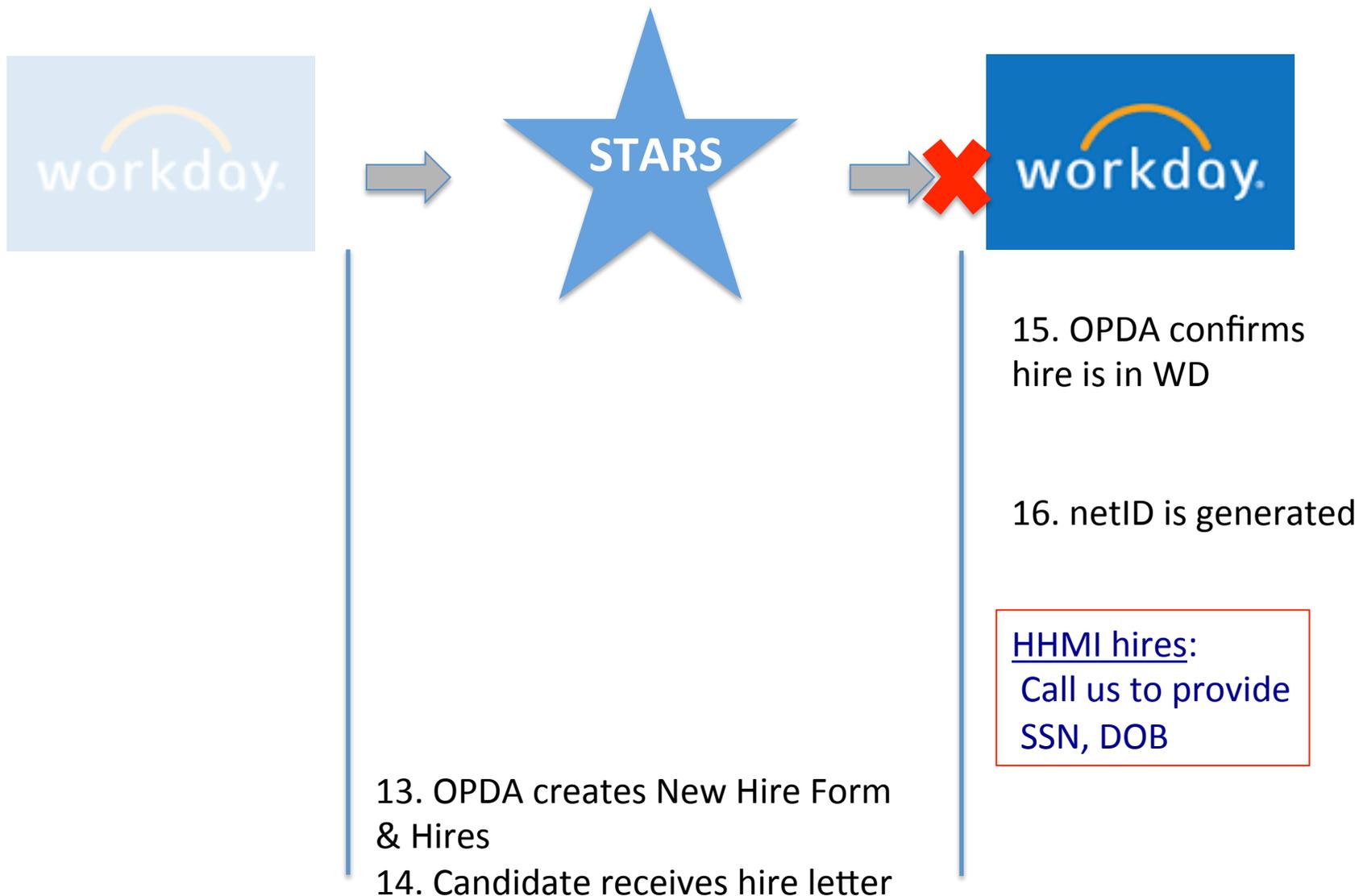
Postdoc/Postgrad Hires use Workday + STARS

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
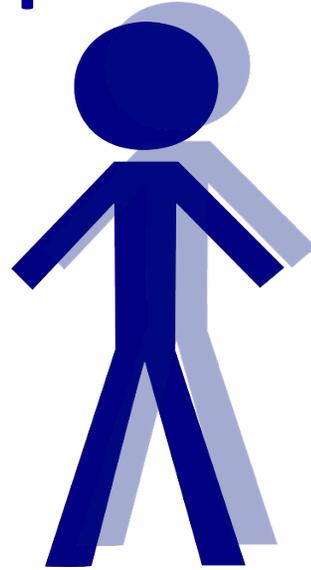
Position (Job)

workday.

Create Job Requisition:
Academic Contingent Worker

Start Here

To-Do

reminder

Academic Appointment

workday.

Academic:
Managing Appointments

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

Create Pre-Hire → Add degree info on next screen

'Create Job Req' is Similar to Postdoc Process

'Create Job Req' is Similar to Postdoc Process

Start | **Recruiting Infor...** | Job | Qualifica...

search

Top > Create Job Requisition > Other Academic Position Request

Other Academic Position Request > Hospital/Psychiatry Resident Hire

Other Academic Position Request > New Hospital Resident - Unpaid

Other Academic Position Request > New Other Academic

Other Academic Position Request > Temporary Other Academic Provider

Recruiting Start Date: Choose today's date or a date in the past. Do no[t]
Target Hire Date: This is the earliest date the selected candidate can sta[rt]
Reason: For staff positions, only choose a grant funded reason if the po[sition]

Recruiting Information

Recruiting Details

Number of Openings	1
Reason *	Other Academic Position Request :
Requester	search
Replacement For	search
Recruiting Instruction	select one ▼
Recruiting Start Date *	08/01/2015
Target Hire Date *	10/01/2015
Target End Date	__/__/____

Select
'New Other Academic'

Recruiting Start Date is today
 or earlier

'Create Job Req' is Similar to Postdoc Process

Job

Job Details

Job Posting Title	*	Laboratory Associate
Justification		
Job Profile	*	Labora
Job Description Summary		
Job Description		
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)

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 ←— Select 'Other Academic'
Time Type	*	Full time
Primary Location	*	search
Additional Locations		(empty)
Scheduled Weekly Hours		0
Work Shift		(empty)

'Contract Contingent Worker' Ties Pre-Hire to Req

Contract Contingent Worker

Supervisory Organization * | Org from Req |

◉ Existing Pre-Hire | Name of Candidate |

◯ Create a New Pre-Hire

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

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)
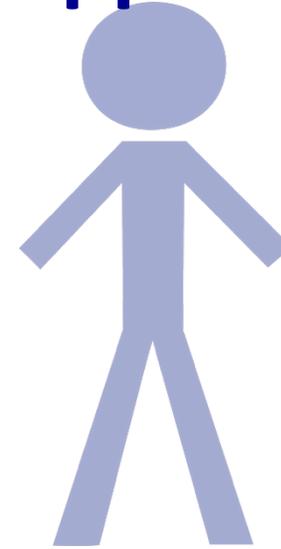
'Add Academic Appointment'

Academic:

Managing Appointments   pgs 1-3

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
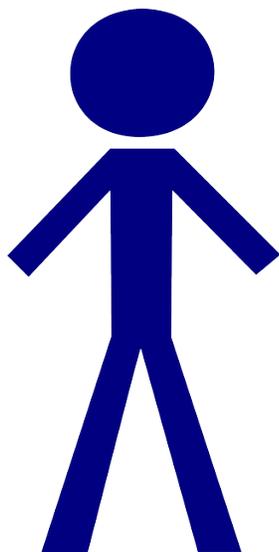
Position (Job)

workday.

Manage Compensation
(Academic)

To-Do
reminder

Academic Appointment

workday.
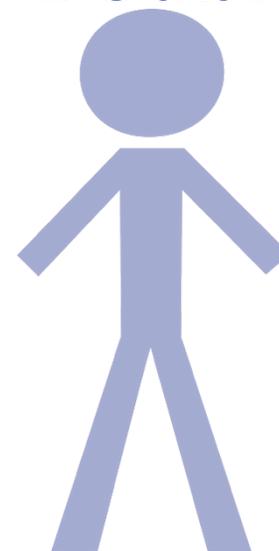
Academic:
Managing Appointments

Start Here

'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
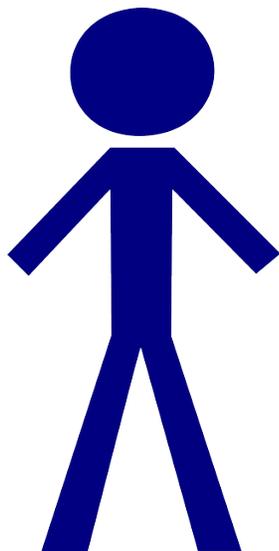
Position (Job)

workday.

Termination/Separation:
Employee (Academic)

Start Here

To-Do ➡️ reminder

Academic Appointment

workday.
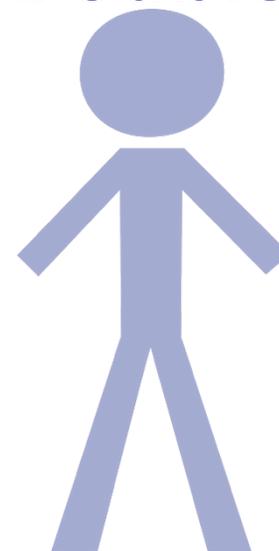
Academic:
Managing Appointments

'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

<u>Field that causes problems</u>: none

If You Process 1 Part and Forget the Other
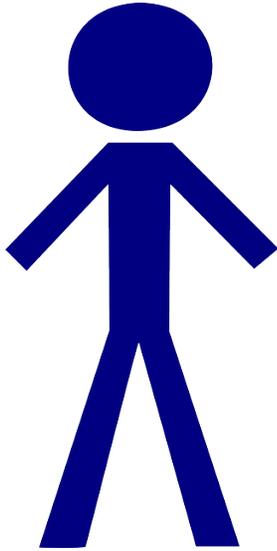
Position (Job)

Forget to terminate:
Postdoc gets paid
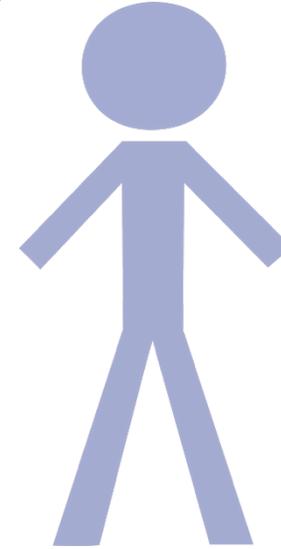
Academic Appointment

Forget to end:
Appointee shows up as active in your dept
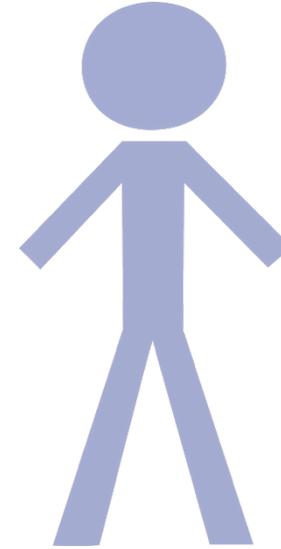
Terminating LA/VF is Different
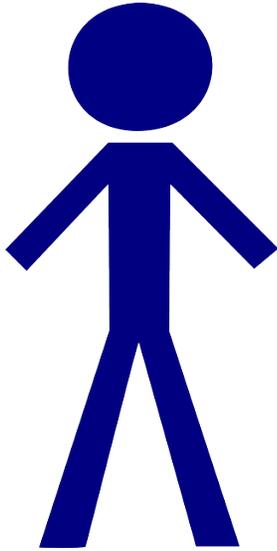
Position (Job)

workday.

Termination/Separation:

Contingent Worker

Start Here

NO To-Do

reminder

Academic Appointment

workday.

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.

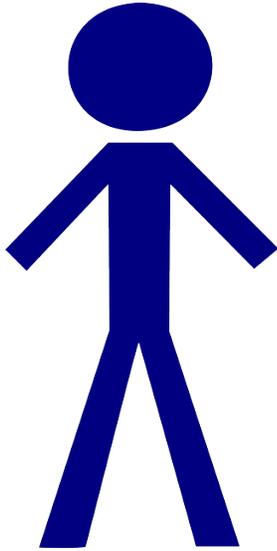- If place appointee on leave of absence, must remember to <u>Request a Return</u> from LOA. Use

  Leave of Absence:
  Academic (Time Off)

- PDA-PDF transitions require double vision (and 2 guides)
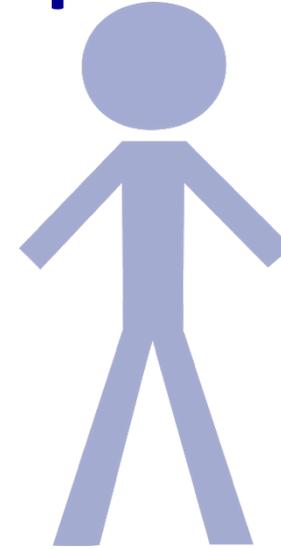
PDA-PDF Transition is a 2 Step Process

Position (Job)

Academic Appointment

To-Do reminder

Change Job:
Convert PDA to PDF (Academic)

Academic:
Managing Appointments

Start Here

PDA-PDF Transition: 1. Update Academic Appointment

Academic:

Managing Appointments pgs 3-4

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 th...
Displays Academic Unit, Appointee, Tenure Status, Track, and Rank. Report include
Sorted by Academic Unit, Track Type, Rank, then Academic Appointee.

Academic Structure Node — search

Academic Unit — search
✖ Forestry and Environmental Studies ← Your Unit

Academic Track Type Category — search

Academic Rank — search
✖ Laboratory Associate
✖ Postdoctoral Associate
✖ Postdoctoral Fellow ← Rank(s) of interest
✖ Postgraduate Associate
✖ Postgraduate Fellow
✖ Visiting Fellow

Appointment Type — search

Appointment Expires On or After ✱ 10/01/2015

Appointment Expires On or Before ✱ 10/31/2015 ← Upcoming month

Untitled Filter

Report #2: *'Academic QA – Expired Current Appointments'*

Workday is Different

As foreigners, use the guides (and these slides)

Think & see in double vision

Run reports to be in the know