

Yale *Business Operations*

SERVICE GROUPS

1. Getting Started at Yale (Onboarding) - Ensure that new employees (Faculty, Staff, Post Docs & Academics new to administration) have the tools, information, and access required to become fully acclimated in their positions as rapidly as possible.

Service components include: new employee paperwork for benefits, payroll, taxes; ID badges; NetIDs; e-mail; access to systems and buildings; transferring grants from other institutions; completion of compliance requirements; training; visas, etc.

2. Faculty Recruitment, Appointments and Promotions (including affiliates) - Enable senior leaders to identify, select and appoint high quality candidates (Faculty/PDA/PDF/ARS) as expeditiously as possible; and provide information, tools and processes that enable faculty appointments, promotions and other life cycle events to be documented and updated easily and accurately.

Service components include: position approval, position classification, position posting, applicant review, interview, evaluation, selection, offer/negotiation, EEO search, and academic profile, biosketch, curriculum vitae, appointment history, promotions process tracking/status, leave of absence, merit process, salary equity reviews, etc.

3. Position & Compensation Management - Enable managers and human resource generalists to efficiently and accurately gain approval for and record changes to employee (Faculty, Staff and Post Docs) assignments and compensation.

Service components include: promotions/transfers to other units, job reclassifications, extra payments, bonus, additional assignments, summer compensation, etc.

4. Workforce Management - Provide information, tools, and processes that enable managers, administrators, senior leaders and human resources generalists to understand, manage, and develop their workforce.

Service components include: time tracking, organization structure, system access, performance reviews, talent development, talent identification, competency tracking, training, merit process, salary equity reviews, organizational restructuring, succession planning, workforce surveys, etc.

5. Hiring Staff - Enable senior leaders and managers to identify, select and appoint high quality staff candidates as expeditiously as possible.

Service components include: position approval, position classification, position posting, applicant review, interview, evaluation, selection, offer/negotiation, EEO search, background check, etc.

6. Student & Temporary Hiring & Life Cycle Management - Enable faculty and managers to identify, select and hire high quality job candidates (Students and Temporary Workers) as expeditiously as possible.

Service components include: position approval, position classification, position posting, applicant review, interview, evaluation, selection, rate of pay, time tracking, payment processing, etc.

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7. Accuracy of Unit Financial Statements - Ensure that business offices, payroll, and accounting transaction offices have cohesive processes for efficiently distributing and adjusting charges that result in accurate payroll and financial statements.

Service components include: labor distribution, allocations, effort, labor commitments, labor distribution adjustments, labor planning, journal processing, batch transaction uploads, monthly close & reporting, etc.

8. Unit Financial Management - Enable managers, business office personnel, and principal investigators the ability to efficiently conduct regular monitoring of budget and financial activity in their area of responsibility in order to ensure accuracy and validity of financial transactions.

Service components include: review of high risk/high dollar transactions, compliance with federal requirements, consistency with donor intent; flagging of unique transaction and potential errors; review of budget variances; routing processes for problem transactions, documentation of reviews and control assurances

9. Purchasing Goods & Services (External, Internal-ISPs,) - Enable faculty and staff to easily purchase and pay for goods and services from internal or external providers in a timely and efficient manner.

Service components include: vendor identification, requisition, approval/restrictions, supplier portal, receipt of goods, payment, tracking/reporting (sole source, contracts, etc.), internal rate setting, billing, internal payments, etc.

10. Arranging Travel, Business & Special Events (Expense Management) - Enable faculty and staff to easily make arrangements and pay for business events related to travel, meetings and department special events (including faculty meetings, guest speakers, recognition events, etc).

Service components include: credit card processing/restrictions, description of purchase, sole source, receipt submission, approval, charging, reporting, etc.

11. Gift & Endowment Stewardship - Enable faculty, department, development and financial staff to easily and accurately establish, monitor and maintain gift and endowments.

Service components include receipt of funds, set-up of accounts, identification and monitoring of restrictions, expenditures/approval, internal tracking/reporting, access to original gift documentation, financial reporting to donors, etc.

12. Sponsored Awards Management (Federal, Non-Federal, Clinical Trials) - Enable faculty and staff to easily and in a timely and efficient manner submit, receive, monitor and close-out sponsored awards.

Service components include: roles & responsibilities, integration of the research enterprise systems (e.g, IRIS, IACUC, etc), reporting, cost transfers, sub-awards, business process – financial reporting to sponsors, close-out, etc.

13. Information Delivery - Provide information to decision makers, analytical support staff, and those with control responsibilities, through applications that are aligned with information needs of the user, user behavior and skills, and the information maturity of the organization.

Issues include: when and how to standardize reporting; optimal utilization of ad-hoc reporting; integration of reporting opportunities across different systems, organizational maturity to use, interpret, and act on information; organizational responsibility for report creation; alignment of information location/distribution with user preferences; campus-wide collaboration to reduce duplication of data and effort.