April 29, 2020

Dates for Academic Appointments in Workday

Spring Cleaning 2020 - Week 2



UNIVERSITY of WASHINGTON OFFICE OF ACADEMIC PERSONNEL

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Agenda

Definitions

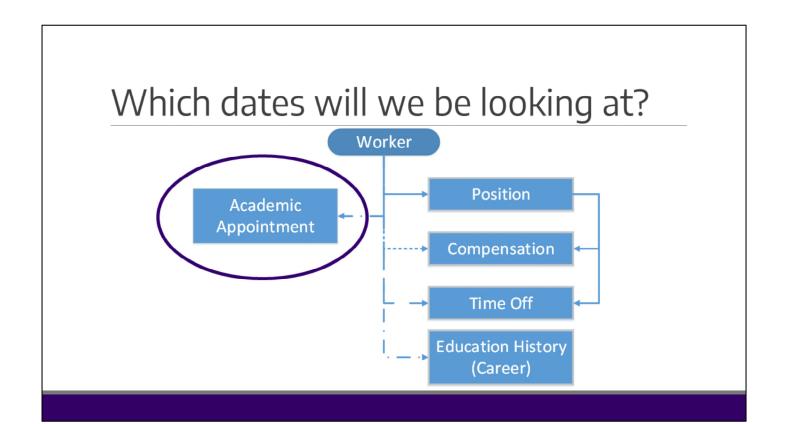
Dates for Academic Appointments in Workday

"Start" Dates to use when updating Academic Appointments

 $Reports \ to \ Run \ to \ Identify \ Issues \ with \ Academic \ Appointment \ Dates \ in \ Work day$

Questions?

Definitions



Dates for Academic Appointments in Workday

Which dates will we be looking at?

Track Start/End Date

Appointment Start/End Date

Appointment Update Date

Actual Appointment End Date

Academic Review Date

Tenure Track Start Date

Probationary End Date

Tenure Award Date

Track Start Date (Override) Adjusted Title Start Date

Track Start/End Date

What is a "Track Date"?

- It describes the complete time an academic person has held an academic appointment in a given Academic Track
 - "Tenure/Tenure Track" contains: Assistant Professor; Associate Professor Tenure Track; Associate Professor; Professor Tenure Track; Professor
 - "Clinical Non-Salaried Faculty" contains: Clinical Instructor, Non-Salaried; Clinical Assistant Professor, Non-Salaried; Clinical Associate Professor, Non-Salaried; Clinical Professor, Non-Salaried

Changes between tracks should be implemented by ending the existing appointment and adding a new one

Track Start/End Date (cont.)

What do the start and end dates mean?

- Track Start Date indicates the earliest appointment start date in the specified track
- Track End Date indicates the last appointment end date in the specified track

How do different transaction types affect Track Dates?

- "Add Academic Appointment" may set the Track Start Date
- "End Academic Appointment" will set the Track End Date
- "Update Academic Appointment" will not affect the Track Start Date or the Track End Date

Changes between tracks should be implemented by ending the existing appointment and adding a new one

Academic Appointment Start/End Dates

What is an "Academic Appointment Date"?

- The time a person has held an academic appointment in a given Academic Rank
 - Assistant Professor; Associate Professor Tenure Track; Clinical Instructor, Non-Salaried; Lecturer Part-time Temporary; Senior Lecturer Full-time; Professor Emeritus; Postdoctoral Scholar

Promotions and Awards of Tenure within the same academic track type should be done via "Update Academic Appointment", any other change should be done using "Add Academic Appointment" and/or "End Academic Appointment"

Update Academic Appointment impacts will be discussed in more detail later

Academic Appointment Start/End Dates (cont.)

What do the start and end dates mean?

- Academic Appointment Start Date is the start date of the specified academic appointment
- · Academic Appointment End Date is the planned end date of the academic appointment

How do different transaction types affect Academic Appointment Dates?

- "Add Academic Appointment" will set the Academic Appointment Start Date
- "End Academic Appointment" does not affect the Academic Appointment Start or End Date
- "Update Academic Appointment" may affect either the Academic Appointment Start Date or the Academic Appointment End Date

Promotions and Awards of Tenure within the same academic track type should be done via "Update Academic Appointment", any other change should be done using "Add Academic Appointment" and/or "End Academic Appointment"

Update Academic Appointment impacts will be discussed in more detail later

Appointment Update Date

What is the "Appointment Update Date"?

• The most recent effective date of an Update Academic Appointment action other than the current appointment start date

How is this date used?

 Workday uses it to indicate when there has been an effective dated change to an academic appointment

How do different transaction types affect the Appointment Update Date?

- "Add Academic Appointment" will not affect the date
- "End Academic Appointment" will not affect the date
- "Update Academic Appointment" will only affect the date if the "Start Date" of the update is a date other than the current appointment start date

Track Dates and Appointment Dates in Action

P - Primary Urban Design and Planning Assistant Professor Assistant Professor 100.00% 09/01/2017 09/01/2017 06/15/2023 P - Primary Real Estate Assistant Professor Assistant Professor 100.00% 09/01/2017 09/16/2017 06/15/2023	nd Last Updated	Appointment End	Appointment Start	Track Start	Roster %	Title	Academic Rank	Academic Unit	Identifier
P - Primary Real Estate Assistant Professor Assistant Professor 100.00% 09/01/2017 09/16/2017 06/15/2023	09/16/2017	06/15/2023	09/01/2017	09/01/2017	100.00%	Assistant Professor	Assistant Professor	Urban Design and Planning	P - Primary
		06/15/2023	09/16/2017	09/01/2017	100.00%	Assistant Professor	Assistant Professor	Real Estate	P - Primary
D - Dual Geography Adjunct Assistant Professor Adjunct Assistant Professor 0.00% 04/01/2018 04/01/2018 06/15/2020		06/15/2020	04/01/2018	04/01/2018	0.00%	Adjunct Assistant Professor	Adjunct Assistant Professor	Geography	D - Dual

Identifier	Academic Unit	Academic Rank	Title	Roster %	Track Start	Appointment Start	Appointment End	Track End
P - Primary	Biobehavioral Nursing & Health Informatics	Clinical Assistant Professor - Non Salaried	Clinical Assistant Professor	0.00%	12/16/2015	12/16/2015	06/30/2018	08/31/2017
P - Primary	Biobehavioral Nursing & Health Informatics	Affiliate Associate Professor	Affiliate Associate Professor	0.00%	03/16/2018	03/16/2018	06/30/2019	09/15/2018
P - Primary	Biobehavioral Nursing & Health Informatics	Lecturer Part-Time Temporary	Lecturer Part-Time Temporary	77.50%	09/16/2018	09/16/2018	09/15/2019	09/15/2019
P - Primary	Biobehavioral Nursing & Health Informatics	Senior Lecturer Part-time	Senior Lecturer Part-time	50.00%	09/16/2019	09/16/2019	06/15/2022	

Note: Examples are from the Appointment History view and include active and inactive appointments

Example 1

- Track Start Date for first two appointments is the hire date
- Last Updated for 1st appointment and Appointment Start for 2nd appointment align, title is the same, this is the unit change
- 9/16/2017 is the "Actual Appointment End Date" for the first appointment

Example 2

- Lots of appointments in different tracks here each track end date indicates that the appointment was ended in the system
- You can see that several of these appointments were ended so the person could be moved into a new title.

Actual Appointment End Date

Custom value added by UW prior to go live

Used to more clearly describe the end date of an academic appointment

Frequently included in custom reports in Workday (e.g. R0401, R0553, R0612)

Calculation Returns:

- Academic Appointment Update Date when present; if blank, then returns
- Academic Appointment Track End Date; if blank, then returns
- Academic Appointment End Date when present

Designed to ensure accurate reporting in a number of cases:

- Early promotion from an academic rank subject to mandatory review
- Promotion from an academic rank not subject to mandatory review
- Termination (prior to expected end of term appointment or for indefinite appointments)

cademic Rank	Academic Track Type	School/College/Campus	Academic Unit	Academic Unit Code	Academic Appointment Identifier	Academic Appointment Start Date	Academic Appointment End Date	Track Start Date	Track End Date	Actual Appointment En Date
Clinical Assistant Professor - Non Salaried	Clinical Non-Salaried Faculty	School of Nursing	Biobehavioral Nursing & Health Informatics	017	P - Primary	05/08/2017		05/08/2017	06/30/2018	06/30/2018
Assistant Professor	Professorial	College of Built Environments	Real Estate	128	P - Primary	09/16/2017	06/15/2023	09/01/2017		06/15/2023
Clinical Assistant Professor - Salaried	Clinical Salaried Faculty	School of Nursing	Family and Child Nursing	049	P - Primary	09/16/2017	06/30/2020	09/16/2017	09/15/2019	09/15/2019
Clinical Instructor - Non Salaried	Clinical Non-Salaried Faculty	School of Nursing	Biobehavioral Nursing & Health Informatics	017	P - Primary	09/16/2014	06/30/2019	09/16/2014	06/30/2019	06/30/2019
Clinical Instructor - Non Salaried	Clinical Non-Salaried Faculty	School of Nursing	Biobehavioral Nursing & Health Informatics	017	P - Primary	12/16/2018	06/30/2020	12/16/2018		06/30/2020
Associate Professor WOT	Professorial - Without Tenure	School of Nursing	Biobehavioral Nursing & Health Informatics	017	P - Primary	07/01/2005	08/15/2017	07/01/2005		05/25/2018
Associate Professor WOT	Professorial - Without Tenure	School of Nursing	Biobehavioral Nursing & Health Informatics	017	P - Primary	05/25/2018		07/01/2005		

Note: Examples are from R0401 Output and include active and inactive appointments

- Row 1 Actual Appointment End is the Track End Date
- Row 2 Actual Appointment End is the Appointment End Date
- Row 3 Actual Appointment End is the Track End Date
- Row 4 Actual Appointment End is the Track End Date & Appointment End Date (track ended on appointment end date)
- Row 5 Actual Appointment End is the Appointment End Date
- Row 6 Actual Appointment End is the Appointment Update Date (after appointment end date, no track end date)
- Row 7 Actual Appointment End is the empty because no track end and no appointment end (same person as row 6)

Academic Review Date

What is the "Academic Review Date"?

- Date of "Second Year Review" for academic personnel in clockmanaged titles
 - Review occurs in spring quarter of second year of service (fall quarter of the third year for senior assistant librarians)
 - Titles subject to this review include: Assistant Professor, Assistant Professor APL WOT, Assistant Professor Clinical Dental Pathway, Assistant Professor WOT, Research Assistant Professor, Associate Professor Tenure Track, Professor Tenure Track, and Senior Assistant Librarian

There is a known issue when the Academic Review Date precedes the Appointment Start Date that we are working on resolving.

Academic Review Date (cont.)

How is this date used?

• Track when Second Year Review should occur and identify who is subject to review.

How do different transaction types affect the Academic Review Date?

- "Add Academic Appointment" will not affect the date
- "End Academic Appointment" will not affect the date
- "Update Academic Appointment" will only affect the date if a new date is entered as part of the update

There is a known issue when the Academic Review Date precedes the Appointment Start Date that we are working on resolving.

Probationary End Date

What is the "Probationary End Date"?

- Date the promotion or award of tenure decision is due for academic personnel in clock-managed titles.
 - Commonly referred to as "Mandatory Review Date"
 - The decision process should start in the year before end date.
 - Titles subject to this review include: Assistant Librarian, Assistant Professor, Assistant Professor APL WOT, Associate Librarian Provisional, Assistant Professor Clinical Dental Pathway, Assistant Professor WOT, Research Assistant Professor, Associate Professor Tenure Track, Professor Tenure Track, and Senior Assistant Librarian

 Work on ending the use of this date is in progress, but it should continue to be used until that change has been implemented

Probationary End Date (cont.)

How is this date used?

- It is used to track when the mandatory promotion/award of tenure review should take place, and to identify people who are subject to this review process.
- Since this date should correspond to the appointment end date, OAP is planning to end use of this date field.

How do different transaction types affect the Academic Review Date?

- "Add Academic Appointment" will not affect the date
- "End Academic Appointment" will not affect the date
- "Update Academic Appointment" will only affect the date if a new date is entered as part of the update

 Work on ending the use of this date is in progress, but it should continue to be used until that change has been implemented

Tenure Track Start Date

What is the "Tenure Track Start Date"?

- The date the faculty member entered the "Tenure/Tenure Track" academic track type
- Titles eligible to be assigned this date include: Assistant Professor, Associate
 Professor Tenure Track, Associate Professor, Professor Tenure Track, Professor

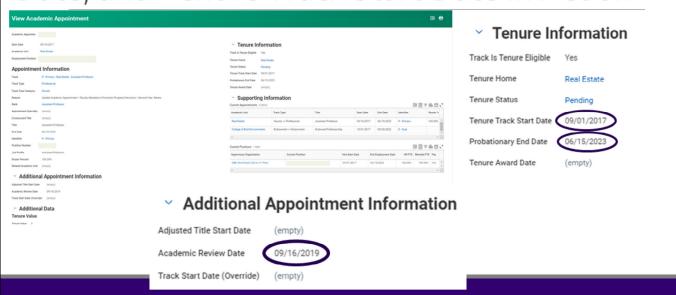
How is this date used?

• It is used to identify when a faculty member entered the tenure track.

How do different transaction types affect the Tenure Track Start Date?

- "Add Academic Appointment" sets the date
- "End Academic Appointment" will not affect the date
- "Update Academic Appointment" will only affect the date if a new date is entered as part of the update or if the appointment start date of a qualifying academic appointment is changed to an earlier date

Academic Review Date, Probationary End Date, and Tenure Track Start Date in Action



Tenure Award Date

What is the "Tenure Award Date"?

- The date an award of tenure took effect
- Titles that have received an award of tenure include: Associate Professor, Professor,
 Associate Professor Emeritus, Professor Emeritus

How is this date used?

• Identify faculty who have received an award of tenure.

How do different transaction types affect the Tenure Award Date?

- "Add Academic Appointment" will affect the date if the academic rank is listed above.
- "End Academic Appointment" will not affect the date
- "Update Academic Appointment" will only affect the date if the update includes a change in rank to Associate Professor or Professor from a non-tenured academic rank.

Tenure Award Date in Action

Identifier	Academic Unit	Academic Rank	Title	Roster %	Track Start	Appointment Start	Appointment End	Track End	Last Updated	Tenure Award Date
P - Primary	Urban Design and Planning	Professor	Professor	100.00%	09/01/2016	09/01/2016			09/16/2017	09/01/2016
P - Primary	Real Estate	Professor	Professor	100.00%	09/01/2016	09/16/2017				09/01/2016

Identifier	Academic Unit	Academic Rank	Title	Roster %	Track Start	Appointment Start	Appointment End	Track End	Last Updated	Tenure Award Date
P - Primary	School of Nursing and Health Studies, Bothell	Professor	Professor	100.00%	09/16/2001	09/16/2013		09/15/2017		09/16/2007
P - Primary	Family and Child Nursing	Associate Professor	Associate Professor	100.00%	09/16/2001	09/16/2017			09/16/2019	09/16/2007
P - Primary	Child, Family, and Population Health Nursing	Associate Professor	Associate Professor	100.00%	09/16/2001	09/16/2019				09/16/2007

Note: Examples are from the Appointment History view and include active and inactive appointments

- Example 1: RCEP Tenure Award Date doesn't change
- Example 2: Job Change, then RCEP No Tenure Award Date Change; note track start stays the same

Track Start Date (Override)

What is the "Track Start Date (Override)"?

The corrected Track Start Date

How is this date used?

 This date field should only be used for correction purposes, please contact your Academic HR Specialist before using it.

How do different transaction types affect the Track Start Date (Override)?

- "Add Academic Appointment" will not affect the date
- "End Academic Appointment" will not affect the date
- "Update Academic Appointment" will only affect the date if a new date is entered as part of the update

Adjusted Title Start Date

What is the "Adjusted Title Start Date"?

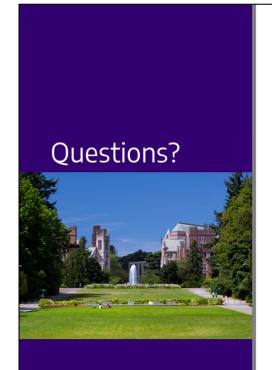
• An additional Workday-delivered date field on the academic appointment

How is this date used?

UW doesn't use it for anything, so it shouldn't be populated

How do different transaction types affect the Adjusted Title Start Date?

- "Add Academic Appointment" will not affect the date
- "End Academic Appointment" will not affect the date
- "Update Academic Appointment" will only affect the date if a new date is entered as part of the update



If a part-time lecturer is appointed quarterly and the FTE changes each quarter but there's no break in service for the academic year, do we use the start date for the academic year or start date of each quarter?

In this circumstance, you would use the start date of the new quarter. If there was no change in the FTE of the contract, the start date used when updating the appointment would be the current appointment start.

"Start" Dates for Updating Academic Appointments

Impact of "Start" Dates When Updating an Academic Appointment

Using the Effective Date of the change

- Adds a value to Appointment Update Date
- · Creates a new entry in Appointment History with a new appointment start date
- Should be used when the update being made to change an attribute of the appointment (other than end date) from the current value

Using the current Appointment Start Date

- Does not affect the appointment start date
- Does not affect the contents of Appointment History
- Should be used when the update being made is to change the end date, enter missing data or correct inaccurate date

Effective Date of the Change

Use the effective date of the change when entering these updates:

- Promotion or Award of Tenure
- Change to the Tenure Value
- Change to the Roster Value
- Change an Appointment Specialty (SOM only)

Current Appointment Start Date

Use the current appointment start date when entering these updates:

- Reappointment
- Clock Extension (postponement or waiver year)
- Correction of inaccurate data entry
- Entry of missing data

• If there have been other effective dated changes, using the original appointment start date will create overlapping active appointments

Examples of "Start Date" Impacts Track Type Academic Rank Roster % Track Start Appointment Start Appointment End Track End Last Updated Clinical Assistant Professor Professor - Non Salaried Family and Child Nursing 0.00% 07/01/2013 Faculty >> Professorial - Research P - Primary Family and Child Nursing Research Assistant Professor Research Assistant Professor 100.00% 09/01/2017 09/01/2017 06/30/2020 09/16/2019 Family and Child Nursing 100.00% 09/01/2017 09/16/2019 06/30/2023 Roster Start Appointment Start Appointment End Last Updated Academic Rank Track Type Identifier Academic Unit Faculty >> Professorial - Without P - Primary Family Medicine Assistant Professor WOT Assistant Professor without Tenure 70.00% 05/01/2015 05/01/2015 06/30/2021 09/01/2019 Track Type Identifier Academic Unit Academic Rank Last Updated Faculty >> Professorial - P - Primary Without Tenure Psychiatry and Behavioral Assistant Professor Without Tenure Assistant Professor Without Tenure 51.00% 09/01/2016 09/01/2016 06/30/2022 12/16/2018 Faculty >> Professorial - P - Primary Psychiatry and Behavioral 100.00% 09/01/2016 12/16/2018 06/30/2022

- Note: Examples are from the Appointment History view and include active and inactive appointments
- Example 1 Reappointment entered using effective date no other change, should have used 9/1/2017 as "start date" for update
- Example 2 Waiver year added using effective date no other change, should have used 5/1/2015 as "start date" for update
- Example 3 Roster Value changed using effective date correct

Non "Update" Changes

If the "update" is any of the following, the current appointment needs to be ended, and a new appointment needs to be added:

- Change the academic track type
- Change the academic unit (other than an RCEP, which will be handled via EIB)
- Change the academic rank (other than a promotion or award of tenure)

- None of these changes should be entered using the "Update Academic Appointment" BP
- These changes are most frequently the result of a new role at the university, so are not updates to the existing appointment.



When you do need to change a track type, and therefore end the existing appointment and create a new appointment, is there a way to create the new appointment before the business process for ending the existing appointment has completed?

If the appointment you are ending is the primary appointment, you need to complete the end academic appointment before you can complete the new primary appointment.

Reports to Run

R0630: Invalid Appointment End Date

Invalid Appointment End Date Audit R0630

Instructions Please select the academic rank(s), track type(s), academic unit(s), and/or School/College/Campus you auld like to see data for. Academic appointments with invalid end dates will be returned, including expired academic appointments that have not been ended.

End dates should be entered or corrected using the Update Academic Appointment business process using the "Update Academic Appointment business process using the "Update Academic Appointment Should be ended using the appropriate "End Academic Appointment duration details, please go to the appropriate page on https://ap.washington.edu/ahr/academic-titles-ranks/

To see all invalid appointment end dates for all academic units, do not select any prompt values.

4/27/202

mic Appointment >

For maximum term

Academic Rank	≔
Academic Track Type	≔
Academic Unit	≔
School/College/Campus (Selection option from "All" category)	≔

Hot Tips:

R0630: Invalid Appointment End Date

To run the report for a departmentalized school, college, or campus, use the "School/College/Campus" prompt

Report output includes expired academic appointments

Maximum appointment durations are identified in Sextant (ap.wa.edu/sextant)

 Professor, Associate Professor, Professor WOT, Associate Professor WOT and Emeritus appointment durations should all be indefinite, and don't need an end date in Workday

Why we built R0630

Several reports depend on appointment end dates to run correctly

- R0555 Appointments eligible for reappointment
- R0353.1 Academics with Approaching Mandatory Review Date
- R0361 Expired & Expiring Academic Appointments

Many academic titles have limits established by the Faculty Code, the Librarian Personnel Code, and APS.

Possible actions to take after running R0630

If the appointment has expired

- Extend the end date using the appropriate update business process
- End the academic appointment

If the appointment has an invalid end date

• Update the academic appointment to correct/remove the end date

Which date should be used for this correction?

Effective Date

Current Appointment Start Date

Run this report monthly to ensure academic appointments have valid end dates.

• If an expired appointment is included in the reappointment population, and the faculty member has not been notified that they were not reappointed, the appointment needs to be extend through the 2020-21 academic year.

R0361: Expired & Expiring Academic Appointments

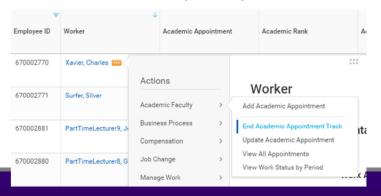
Academic Appointment Expiration Audit R0361								
Instructions	All expired academic appointments, and any academic appointments with end dates in the next 30 days will be returned appointment ended using the "End Academic Appointment" business process. Continuing appointments should be reappointed using							
		also be reviewed, and ended or updated as appropriat nits, do not select an academic unit or School/College	702 6					
Academic Ran	k	∷≡						
Academic Trac	k Type	∷≡						
Academic Unit		∷≡						
School/College	e/Campus (Selection option from "All" category)	≔						

Hot Tips:

R0361: Expired & Expiring Academic Appointments

This report is the data source for the alerts being sent to academic partners on the 22^{nd} of each month.

You can launch the End Academic Appointment and Update Academic Appointment transactions from the report output.



Why we built R0361

Academic Appointments need to be ended in Workday using the appropriate End Academic Appointment business process.

Academic Appointments that fell out of the Reappointments EIB or aren't eligible to be included in the EIB need to be extended in Workday using the appropriate Update Academic Appointment business process.

Possible actions to take after running R0361

If the appointment is still active, extend the end date using the appropriate update business process and reason

If the appointment has ended, end it using the appropriate business process and reason

Run this report monthly to ensure academic appointments have been entered correctly.

• If an expired appointment is included in the reappointment population, and the faculty member has not been notified that they were not reappointed, the appointment needs to be extend through the 2020-21 academic year.

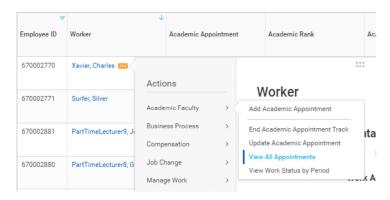
Appointments Missing Academic Review Dates Report

Hot Tips:

Appointments Missing Academic Review Dates Report

To run the report for a departmentalized school, college, or campus, select the appropriate check box option

You can jump directly to the faculty member's academic appointments directly from the report output



 You can also click on the worker name to access their profile, or right click on the worker name to open the profile in a new tab.

Why we built Appointments Missing Academic Review Dates Report

R0353.2: Academics with Approaching Second Year Review Date depends on this date being entered

Second Year Reviews are required by the Faculty Code and Librarian Personnel Code

Possible actions to take: Appointments Missing Academic Review Dates

Update the academic appointment to enter the Academic Review Date

Run this report monthly to ensure academic appointments have been entered correctly.



Can you keep the R0 number on all slides relevant to that report?

Certainly!

Up Next

Feel free to reach out to Carla Englander directly by emailing acaddata@uw.edu or by calling (206) 616-4735

5/6: Academic Appointment Data in Detail