Workday Academic Appointment Data in Detail

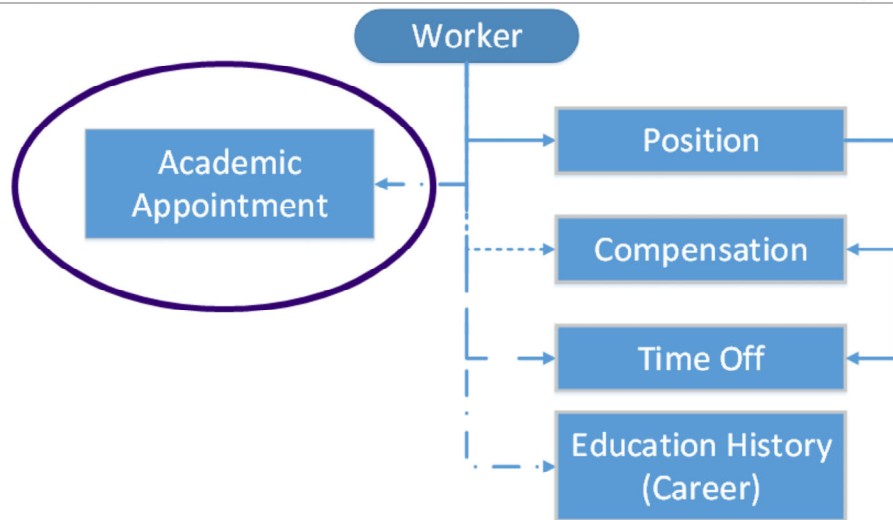## Spring Cleaning 2020 – Week 3

Agenda

Definitions

Workday Academic Appointment Data Details

Reports to Run to Identify Issues with Academic Appointments in Workday

Questions?

Definitions

Which dates will we be looking at?

Workday Academic Appointment Data Details

What data is associated with the Academic Appointment in Workday?

View Academic Appointment

Academic Appointee Xavier, Charles

Start Date	09/01/2015
Academic Unit	Information School
Employment Position	(empty)

Appointment Information

Track	P - Primary - Information School - Associate Professor
Track Type	Professorial
Track Type Category	Faculty
Reason	Add Academic Appointment > Add Academic Appointment > Add Academic Appointment
Rank	Associate Professor
Appointment Specialty	(empty)
Constructed Title	Associate Professor
Title	Associate Professor
End Date	08/31/2021
Identifier	P - Primary
Roster Percent	100.00%
Related Academic Unit	(empty)

∨ Additional Appointment Information

Adjusted Title Start Date	(empty)
Academic Review Date	(empty)
Track Start Date (Override)	(empty)

∨ Tenure Information

Track Is Tenure Eligible	Yes
Tenure Home	Information School
Tenure Status	Tenure
Tenure Track Start Date	09/01/2015
Probationary End Date	(empty)
Tenure Award Date	09/01/2015

∨ Supporting Information

Current Appointments 1 item

Academic Unit	Track Type	Title	Start Date
Information School	Faculty >> Professorial	Associate Professor	09/01/2015

Current Positions 1 item

Supervisory Organization	Current Position	Hire Start Date	End Employment Date	HR FTE
Metropolis Academic (Pennyworth, Alfred)	PN-8999529 Associate Professor	09/01/2014		100.00%

- Academic Appointee: Worker Name
- **Start Date: Academic Appointment Start Date – *discussed during Week 2***
- Academic Unit: Appointing Unit
- Employment Position: Related Positon

Academic Appointee

View Academic Appointment

Academic Appointee	Xavier, Charles
Start Date	09/01/2015
Academic Unit	Information School
Employment Position	(empty)

Auto populated by Workday

Identifies the person the academic appointment is tied to.

Academic Unit

View Academic Appointment

Academic Appointee	Xavier, Charles
Start Date	09/01/2015
Academic Unit	Information School
Employment Position	(empty)

Primary and secondary academic appointments: appointing department or division (selected departments in SOM, Bothell School of STEM only).

Administrative appointments: appointing unit (any level of the academic unit hierarchy).

Endowed appointments: appointing unit (any level of the academic unit hierarchy).

Please see slides from Spring Cleaning 2020 Week 1 for more information about the academic unit hierarchy.
Secondary appointments include joint and adjunct appointments (identifier for joint appointments is determined by the academic track type).

Employment Position

View Academic Appointment

Academic Appointee	Xavier, Charles
Start Date	09/01/2015
Academic Unit	Information School
Employment Position	(empty)

Related position for appointment
- Should only be entered on the appointment that corresponds to the position
  - Use the administrative appointment for deans, chancellors, vice provosts, provost, and president

Errors will result when:
- Position is linked to by more than one academic appointment
- Position start date is different from academic appointment start date

Please do not enter if errors appear during entry!

Employment Position is not required data entry, and should be skipped if Workday requires changes to the appointment to support entering the value

Questions & Answers

Q: Should the Employment Position be left blank if the title is below dean?

A: *It can be left blank at any time, and should only be populated when required by Workday.*

Section 2: Appointment Information

- Track
- Track Type
- Track Type Category
- Reason
- Rank
- Appointment Specialty
- Constructed Title
- Title
- End Date
- Identifier
- Position Number
- Job Profile
- Roster Percent
- Related Academic Unit

Appointment Information

Track	P - Primary - Information School - Associate Professor
Track Type	Professorial
Track Type Category	Faculty
Reason	Update Academic Appointment > Tenure Value > Adjustment to Tenure Value
Rank	Associate Professor
Appointment Specialty	(empty)
Constructed Title	Associate Professor
Title	Associate Professor
End Date	(empty)
Identifier	P - Primary
Position Number	
Job Profile	Associate Professor
Roster Percent	100.00%
Related Academic Unit	(empty)

- **Track: Academic Appointment**
- **Track Type**
- **Track Type Category**
- **Reason: Reason code for most recent transaction related to the academic appointment – *auto populated by Workday***
- Rank: Academic Rank
- **Appointment Specialty: SOM Only Value**
- **Constructed Title: Title derived from academic rank – *auto populated by Workday***
- **Title: Title entered (defaults to academic rank) – *auto populated by Workday***
- **End Date: Appointment End Date – *discussed during Week 2***
- Identifier: Appointment Identifier
- **Position Number: Position ID of Related Position - *auto populated based on employment position in previous section***
- **Job Profile: Job Profile of Related Position - *auto populated based on employment position in previous section***
- Roster Percent: Contracted Maximum Rate of Employment
- **Related Academic Unit: Do Not Use**

Appointment Track

Appointment Information

Track	P - Primary - Information School - Associate Professor
Track Type	Professorial
Track Type Category	Faculty
Reason	Update Academic Appointment > Tenure Value > Adjustment to Tenure Value
Rank	Associate Professor
Appointment Specialty	(empty)
Constructed Title	Associate Professor
Title	Associate Professor
End Date	(empty)
Identifier	P - Primary
Position Number	
Job Profile	Associate Professor
Roster Percent	100.00%
Related Academic Unit	(empty)

Description of the academic appointment

Concatenation of the appointment identifier, academic unit, and academic rank

Set when the appointment is added or updated

"Appointment Track" is the Workday term used to describe the academic appointment.

Track Type, Track Type Category, and Academic Rank

Appointment Information

Track	P - Primary - Information School - Associate Professor
Track Type	Professorial
Track Type Category	Faculty
Reason	Update Academic Appointment > Tenure Value > Adjustment to Tenure Value
Rank	Associate Professor
Appointment Specialty	(empty)
Constructed Title	Associate Professor
Title	Associate Professor
End Date	(empty)
Identifier	P - Primary
Position Number	
Job Profile	Associate Professor
Roster Percent	100.00%
Related Academic Unit	(empty)

Organizational structure for academic appointments

- Academic Track Types: map to categories identified in Faculty Code, Librarian Personnel Code
- Academic Track Type Categories: map loosely to academic personnel categories in APS 40.1
- Academic Rank: Specific titles identified in Faculty Code, Librarian Personnel Code, APS 40.1, and collective bargaining agreements

Appointment Identifier

Appointment Information

Track	P - Primary - Information School - Associate Professor
Track Type	Professorial
Track Type Category	Faculty
Reason	Update Academic Appointment > Tenure Value > Adjustment to Tenure Value
Rank	Associate Professor
Appointment Specialty	(empty)
Constructed Title	Associate Professor
Title	Associate Professor
End Date	(empty)
Identifier	P - Primary
Position Number	
Job Profile	Associate Professor
Roster Percent	100.00%
Related Academic Unit	(empty)

Describes the academic appointment at a high level

- P – Primary: Limited to specific track types. Academic Personnel with academic appointments must have one, and only one, primary academic appointment
- J – Joint: Limited to Professorial, Professorial – Without Tenure, Professorial – Research, and Professorial – Clinical Dental Pathway tracks
- A – Administrative: Limited to administrative track types
- D – Dual: Any additional academic appointment in a track other than those specified above and below

Roster Percent

Appointment Information

Track	P - Primary - Information School - Associate Professor
Track Type	Professorial
Track Type Category	Faculty
Reason	Update Academic Appointment > Tenure Value > Adjustment to Tenure Value
Rank	Associate Professor
Appointment Specialty	(empty)
Constructed Title	Associate Professor
Title	Associate Professor
End Date	(empty)
Identifier	P - Primary
Position Number	
Job Profile	Associate Professor
Roster Percent	100.00%
Related Academic Unit	(empty)

Maximum FTE rate for the appointment regardless of funding.

This value does not fluctuate, and any changes are permanent.

This value should only be populated for appointments in the following academic track type categories/track types:

- Faculty: All except Adjunct, Administrative, Administrative Emeritus, Retired Faculty
- Librarian: All except Librarian Retired, Librarian Administrative

Courtesy and Endowment appointments should not have a roster percent, as they do not drive the employment relationship
- Courtesy includes Affiliate, Clinical Non-Salaried, and Emeritus Track Types Postdoctoral Scholars, Residents/Fellows, and Senior Fellows/Senior Fellow Trainees are all required to have roster values of 100% and total FTE values of 100%

Questions & Answers
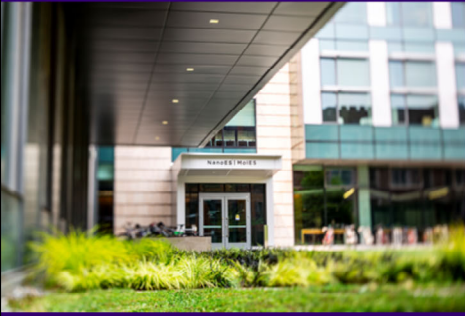
Q: Is Roster Value only required for professorial appointments?

A: *No, it is required for professorial appointments in the "Faculty" academic track type, but is not required for appointments in the "Courtesy Faculty" academic track type.*

Q: How should roster percent for quarterly appointed temporary lecturers work?

A: *The roster percent should reflect the contracted FTE for the quarter of appointment.*

Q: What about emeritus in paid status?

A: *Emeritus faculty have a state-mandated limit of 40% FTE annually, so the roster value doesn't need to be populated regardless of whether they are in paid status.*

Questions & Answers Continued
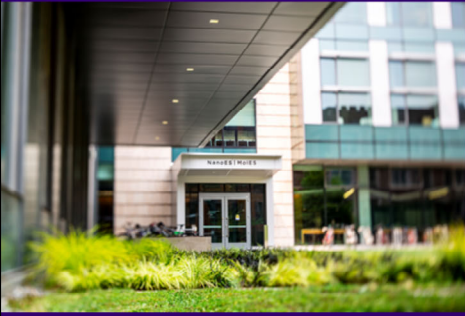
Q: I keep getting an error indicating that the roster value cannot exceed 100% when I attempt to add the roster value to additional affiliate appointments.

A: *Affiliate appointments are in the "Courtesy Faculty" academic track type, and don't need to have roster value entered.*

Q: What do I do if a joint/dual appointment with a roster value ends?

A: *Update the roster value for the primary appointment to the total roster value for that person, using the effective date of the change as the 'start date' for the update action.*

Please note that for appointments in the "Faculty" academic track type, the roster value only needs to be entered on additional appointments if the faculty member's offer letter explicitly states they will be partially employed by one unit, and partial employed in a second unit. Otherwise the entire roster value should be entered on the primary appointment regardless of compensation arrangements.

Section 3: Additional Information

- Adjusted Title Start Date
- Academic Review Date
- Track Start Date (Override)
- Tenure Value

Additional Appointment Information

Adjusted Title Start Date   (empty)
Academic Review Date   03/16/2021
Track Start Date (Override)   (empty)

Additional Data
Tenure Value

Tenure Value   100

- **Adjusted Title Start Date: Do Not Use – *discussed during Week 2***
- **Academic Review Date: Date of Second Year Review for faculty and librarians in clock managed titles – *discussed during Week 2***
- **Track Start Date Override: Use for corrections only – *discussed during Week 2***
- Tenure Value: Tenure Percentage for Associate Professors and Professors
  - (Only appears for appointments in the "Tenure/Tenure Track" academic track type

Tenure Value

Additional Data

Tenure Value

Tenure Value 100

Only populated for faculty who have received an award of tenure

Expected value is 100
- Values for split tenure should total 100
  - Allowed splits: 67/33, 50/50

Can only be reduced at the faculty member's request
- Partial resignation
- A/B Splits

Units can not initiate a reduction in tenure, but positions can be advertised and filled at less than 100% tenure (minimum is 50%)

Questions & Answers

Q: What is the break down of the A/B Salary

A: *The A portion is the tenure value, the B portion is the self funded portion*

Q: Does tenure value show up on any of the Workday academic personnel audit reports?

A: *It is included in R0401: Academic Personnel Appointment Details, but we don't currently have any audit reports designed to identify issues with tenure value entries.*

Section 4: Tenure Information

- Track is Tenure Eligible
- Tenure Home
- Tenure Status
- Tenure Track Start Date
- Probationary End Date
- Tenure Award Date

Tenure Information

Track Is Tenure Eligible	Yes
Tenure Home	Information School
Tenure Status	Tenure
Tenure Track Start Date	09/01/2015
Probationary End Date	(empty)
Tenure Award Date	09/01/2015

This section is only visible for appointments in the Tenure/Tenure Track track type
- **Track is Tenure Eligible: will always be yes –** *auto populated by Workday*
- Tenure Home: Defaults to academic unit for academic appointment
- Tenure Status: Pending or Tenure
- **Tenure Track Start Date: Earliest appointment start date in the academic track type –** *discussed during Week 2*
- **Probationary End Date: Due date for mandatory review –** *discussed during Week 2*
- **Tenure Award Date: Date tenure awarded –** *discussed during Week 2*

Tenure Home

∨ Tenure Information

Track Is Tenure Eligible	Yes
Tenure Home	Information School
Tenure Status	Tenure
Tenure Track Start Date	09/01/2015
Probationary End Date	(empty)
Tenure Award Date	09/01/2015

The academic unit(s) that have made an award of tenure

- For primary appointments the field will auto populate with the appointing unit
- For joint appointment with a tenure value of 0, please update the value to the primary appointing unit
- For joint appointments with split tenure, feel free to update the value of leave the default value.

This is a required field in Workday, but AHR doesn't use it,

Tenure Status

∨ Tenure Information

Track Is Tenure Eligible	Yes
Tenure Home	Information School
Tenure Status	(Tenure)
Tenure Track Start Date	09/01/2015
Probationary End Date	(empty)
Tenure Award Date	09/01/2015

Two options: Pending or Tenure

- Pending: Assistant Professor, Associate Professor Tenure Track, Professor Tenure Track
- Tenure: Associate Professor, Professor

Reports to Run

R0343: Appointments with Invalid Appointment Identifiers

Appointments with Invalid Appointment Identifiers R0343

Instructions
Please select the academic unit(s), and/or School/College/Campus you would like to see appointments for.

Valid appointment identifiers are indicated in Sextant (http://ap.uw.edu/sextant). Academic appointments should be corrected using the Update Academic Appointment business process with the Revision/Correction reason code.

To see all appointments for all academic units, do not select an academic unit or School/College/Campus

37 as of 5/1/2020

Academic Unit

School/College/Campus (Selection option from "All" category)

Hot Tips – R0343

To run the report for a departmentalized school, college, or campus, select the appropriate option from the "School/College/Campus" prompt.

Valid appointment identifiers are indicated in Sextant (http://ap.uw.edu/sextant).

- 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 R0343

Many reports include academic appointments based on the assigned appointment identifier, so they need to be accurate.

Possible actions to take – R0343

Update the academic appointment to correct the appointment identifier

Which date should you use to make the update?

- If the change is due to the end of another academic appointment, please use:

  ⭐ the effective date of the change   ⭐ the current appointment start date

- If the change is a correction to the initial value entered, please use:

  the effective date of the change   ⭐ the current appointment start date ⭐

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

Update Effective Date: Green Check Mark
Current Appointment Start Date: Thumbs Up

R0344: Appointments in Non-Academic Appointing Units

Appointments in Non-Academic Appointing Units R0344

Instructions Please select the academic unit(s), and/or School/College/Campus you would like to see appointments for.

All active academic appointments with a track type other than Administrative, Administrative Emeritus, or Endowment, with an academic unit that is not an academic appointing unit (departmentalized schools, colleges, campuses, or supra-departmental divisions) will be returned. The academic appointment should be corrected using the Update Academic Appointment business process effective the Track Start Date with the "Revision/Correction" reason code.

To see all appointments for all academic units, do not select an academic unit or School/College/Campus

Academic Unit ▭ ☰

School/College/Campus (Selection option from "All" category) ▭ ☰

253 as of 5/1/2020

Hot Tips – R0344

Most of these academic appointments have been assigned the school, college, or campus as the academic unit, so searching by that prompt will be more helpful.

- 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 R0344

The University's executive orders identify units that are eligible to appointment academic personnel, so it is important to ensure that Workday reflects accurate information.

Possible actions to take – R0344

Update the academic appointment to correct the academic unit.

Which date should you use to make the update?

the effective date of the change ⭐ the current appointment start date ⭐

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

Update Effective Date: Green Check Mark
Current Appointment Start Date: Thumbs Up

Additional Reports to Run

Additional audit reports to run monthly

R0613: Upcoming Postdoctoral Scholar Required Compensation Changes

R0321: Upcoming End Employment Dates

R0623: Academic Positions with Invalid Service Periods

Academic Salaries below State Minimum

Audit reports previously highlighted during Spring Cleaning 2020

R0650: Academic Personnel with an Invalid Primary Academic Rank

R0469: Academic Workers Without Primary Academic Appointments

R0612: Academic Appointees without Active Positions

R0630: Invalid Appointment End Date

R0361: Expired & Expiring Academic Appointments

Appointments Missing Academic Review Dates

Reports that support business processes related to academic personnel

R0047: Summer Hiatus Audit Report

R0353.1: Academics with Approaching Mandatory Review Date

R0353.2: Academics with Approaching Second Year Review Date

R0555: Appointments Eligible for Reappointment

R0555.1: Positions Eligible for Reappointment

Reports to find academic personnel information

R0401: Academic Personnel Appointment Details

R0402: Academic Personnel Positions Snapshot by Date

R0614: Postdoctoral Scholar Roster Report
- ◦ Please note, the report does not include appointment end date, that will need to be validated through other reports.

R0237: Voting Faculty

R0317: Faculty on Leave

R0448: Non-Voting Faculty

R0553: New Academic Appointments

Questions?

Q: Is there a report that can be used to identify faculty with voting rights in the academic unit for their joint appointments?

A: *Not currently – the two voting eligibility reports are designed based on the criteria laid out in the Faculty Code, which apply only to primary appointments. Additionally, voting eligibility in joint units is at the discretion of the unit and the faculty member, and is not captured in Workday. This will be raised as a functionality to look into so this information can be included in reports, and rely less on units having to track it locally.*

Q: Can you provide a checklist of all the reports you want us to run monthly?

A: *There is a list available at http://ap.uw.edu/audit-reports/, but I will work with our communications coordinator to update it and make it more easily accessible*

Thank you!

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