2020 CENSUS PREPARATIONS
AGENDA

What is the AP Census?
What are the goals for the census preparations?
How will we achieve those goals?
What are the common data issues?
Resources
WHAT IS THE AP CENSUS?
OVERVIEW

Built annually by OAP

Snapshot

Reflects UW academic personnel population on October 31 of each year
HOW IT IS USED

AP Fact Sheet
AP Profile
AP New Hires & Terminations Reports
Faculty Dashboard (produced by Office of Planning and Budgeting)
IPEDS (Integrated Post Secondary Education Data System) Report
AAUP (American Association of University Professors) Faculty Salary Survey
Affirmative Action Plan
Campus requests for faculty data
Public requests for faculty data submitted via the Public Records Office
## WHO AND WHAT IS INCLUDED

Who is included in this population?
- People with academic appointments on October 31
- People with positions in the Academic Personnel job family group on October 31

What data is included in the census?
- Primary academic appointment
- Position in the Academic Personnel job family group
  - Note: If the person does not have a position in the Academic Personnel job family group, then the worker's primary position is included

Anyone with an appointment or position will be included in the census, but both an active academic appointment and an active position (not necessarily academic) are required for people included.
WHAT ARE THE GOALS?
ACADEMIC APPOINTMENT GOALS

For all individuals with active appointments on October 31:

• Primary appointment entered
• Rank corresponds to the worker’s job profile
• Valid academic appointing unit
• Valid appointment identifier
• Valid roster percent (for multi-year eligible appointments only)
POSITION GOALS

For all individuals with active positions in the Academic Personnel job family group on October 31:

- Position entered
- Job profile that corresponds to worker’s primary academic rank
Expired positions will not be included in the census
HOW WILL WE GET THERE?
2020 CENSUS PREPARATIONS

- **August 13:** Training & Overview
- **Week of August 24:** First Data Delivery
- **August 26:** First Office Hour Session
  - Held weekly through mid-October
  - Will use waiting room and will admit one person at a time to allow for more detailed discussions
- **Week of October 7:** Second Data Delivery
- **October 23:** All transactions for personnel who will be active on October 31 need to be entered in Workday, with dean’s office approvals
- **October 31:** Snapshot Date
- **November 16:** Census Data pulled from Workday
  - Units will be contacted regarding any discrepancies in the census data
VIRTUAL OFFICE HOURS

- Wed, 8/26 - 2:30 PM; Meeting URL: https://washington.zoom.us/j/98012538708
- Mon, 8/31 - 9:30 AM; Meeting URL: https://washington.zoom.us/j/91427998762
- Wed, 9/9 - 10:30 AM; Meeting URL: https://washington.zoom.us/j/98371415700
- Fri, 9/18 - 10:30 AM; Meeting URL: https://washington.zoom.us/j/91418788111
- Tue, 9/22 - 9:30 AM; Meeting URL: https://washington.zoom.us/j/98171444117
- Thu, 10/1 - 2:30 PM; Meeting URL: https://washington.zoom.us/j/91141807423
- Mon, 10/5 - 3:30 PM; Meeting URL: https://washington.zoom.us/j/99897177998
- Fri, 10/16 - 2:30 PM; Meeting URL: https://washington.zoom.us/j/92693886968
- Tue, 10/20 - 1:30 PM; Meeting URL: https://washington.zoom.us/j/96204370745
COMMON DATA ISSUES
RANK & PROFILE DISCREPANCY

Academic rank of primary appointment should correspond to job profile of primary position for most job profiles.

Exceptions (detailed in Sextant) exist for courtesy titles, and in a few specific scenarios.

To resolve this type of issue: Determine correct title; then take action on the appointment or position (whichever is not correct).

Actions may include end/add academic appointment, update academic appointment, data change, or job change.
**EXAMPLES**

<table>
<thead>
<tr>
<th>INVALID RANK &amp; PROFILE</th>
<th>INELIGIBLE ACADEMIC RANK</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Job Profile: Affiliate Associate Professor</td>
<td>• Job Profile: Professor Without Tenure</td>
</tr>
<tr>
<td>• Academic Rank: Affiliate Assistant Professor</td>
<td>• Academic Rank: Adjunct Professor</td>
</tr>
</tbody>
</table>

Example 1: the correct value will need to be determined by reviewing the worker’s record, once the correct job profile and academic rank have been identified the position or academic appointment (whichever is wrong) can be corrected through the appropriate process.

**In the sample case, the worker was moved into paid status from unpaid status, but the job profile and business title were changed as part of the move. There is no promotion action for the worker, so the job change will need to be rescinded and re-entered.**

Example 2: Adjunct appointments can not be primary appointments, so the worker’s record will need to be reviewed to determine if a missing academic appointment needs to be added, or if there are other circumstances.

**In the sample case, the academic appointment has been ended due to a resignation before October 31st, but the position has not been ended yet.**
INVALID
APPOINTMENT IDENTIFIER (3)

Each academic rank has specific identifiers that are valid to be used with that rank when entering the academic appointments.

Valid identifiers are specified in Sextant.

To resolve this type of issue: Determine which of the valid identifiers is correct for the circumstance; then update the academic appointment.

Actions may include end/add academic appointment, and update academic appointment.
### EXAMPLES

<table>
<thead>
<tr>
<th>INVALID “ADMINISTRATIVE”</th>
<th>INVALID “PRIMARY”</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Academic Rank: Adjunct Professor</td>
<td>• Academic Rank: Clinical Assistant Professor Non-Salaried</td>
</tr>
<tr>
<td>• Identifier Assigned: Administrative</td>
<td>• Identifier Assigned: Joint</td>
</tr>
<tr>
<td>• Valid Identifier: Dual</td>
<td>• Valid Identifiers: Primary, Dual</td>
</tr>
</tbody>
</table>

Example 1: There is only one valid identifier for the academic rank, so the academic appointment needs to be updated to change the identifier to “D- Dual”

Example 2: Clinical professor appointments can be assigned the identifier “P-Primary” or “D-Dual”, so the academic appointment needs to be updated. If there is an existing primary appointment, this one should be assigned the “dual” identifier.
INVALID APPOINTING UNIT (220)

Only units identified as academic appointing units by the Board of Regents may be used as the academic unit for appointments in non-administrative tracks.

To resolve this type of issue: Determine the correct academic appointing unit; then update the academic appointment.

Actions may include end/add academic appointment, and update academic appointment.
### EXAMPLES

<table>
<thead>
<tr>
<th>DEPARTMENTALIZED SCHOOL</th>
<th>ADMINISTRATIVE APPOINTMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Academic Unit: School of Nursing</td>
<td>• Academic Unit: University of Washington</td>
</tr>
<tr>
<td>• Academic Rank: Preceptor</td>
<td>• Academic Rank: Dean</td>
</tr>
</tbody>
</table>

Example 1: Since the academic rank is not administrative, and the school is departmentalized, the academic unit needs to be a department

Example 2: While dean positions are in the provost sup org, the academic appointment needs to be in the school.
INVALID PRIMARY APPOINTMENT (130)

All academic personnel with academic appointments in Workday must have one and only one valid “primary” identifier.

Most individuals with this issue do not have an active primary appointment in Workday.

To resolve this type of issue: Determine the primary academic appointment, including active appointments with other identifiers in your evaluation, then take action on the appointment.

Actions may include add academic appointment, and update academic appointment.
### EXAMPLES

<table>
<thead>
<tr>
<th>DUAL APPOINTMENTS</th>
<th>JOINT APPOINTMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Academic Rank: Affiliate Instructor</td>
<td>• Academic Rank: Professor</td>
</tr>
<tr>
<td>• Appointment Identifier: D-Dual</td>
<td>• Appointment Identifier: J-Joint</td>
</tr>
<tr>
<td>• Job Profile: Senior Fellow</td>
<td></td>
</tr>
</tbody>
</table>

Example 1: Academic rank is eligible to be assigned the “P-Primary” identifier, but does not align with job profile. Review the worker’s record to determine whether the dual appointment should be updated to become the primary appointment, or if other action is needed. 
** In the sample case, the worker’s position and primary appointment were scheduled to end on the same date, but neither has been ended in Workday yet. If the position has ended, then the position and both appointments need to be ended in Workday.

Example 2: Academic rank is eligible to be assigned the “P-Primary” Identifier. Review the worker’s record to determine whether the joint appointment should be updated to become the primary appointment, or if another action is needed. 
** In the sample case, the worker’s primary appointment was ended 6/30/2020 due to retirement, so the joint appointment also needs to be ended.
MISSING
ACADEMIC APPOINTMENT (1779)

Academic personnel with positions in nearly all Academic Personnel job profiles are required to have an active academic appointment in Workday (Exceptions detailed in Sextant).

To resolve this type of issue: Determine if there is an expired academic appointment that corresponds to the position, then take action on the appointment.

Actions may include add academic appointment, and update academic appointment.
## EXAMPLES

<table>
<thead>
<tr>
<th>UNPAID ACADEMICS</th>
<th>PAID ACADEMIC JOB PROFILES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• All academic personnel with the Unpaid Academic job profile must have an active academic appointment.</td>
<td>• All academic personnel with job profiles other than Librarian Retired, Associate Librarian Retired, and Retiree – Academic must have an active academic appointment</td>
</tr>
</tbody>
</table>
This validation will support upcoming roster/FTE/tenure valuations.

This audit will be added to R0662, and will be added as a new report to Workday soon.
INCLUDED TRACK TYPES

- Artist in Residence and Professor of Practice
- Lecturer - Multi-Year Eligible
- Professorial
- Professorial - Clinical Dental Pathway
- Professorial – Research
- Professorial - Without Tenure
- Librarian
- Librarian Temporary
Joint appointments can have roster percent values below 50%. The worker’s total roster percent will be used for validation.
MISSING POSITION (64)

Workers with active academic appointments must have a corresponding position entered in Workday.

If the worker has been terminated, all academic appointments must be ended.

If a courtesy appointment was extended through reappointment prior to or after a termination in another academic unit, they should be rehired into the Unpaid Academic job profile effective the termination date.

To resolve this type of issue: Determine the correct job profile or if the academic appointment needs to be ended, then take action on the appointment or position (whichever is not correct).

Actions may include end academic appointment, update academic appointment, job change, or rehire.
EXAMPLES

REAPPOINTED COURTESY FACULTY

- Faculty with courtesy academic appointments (affiliate, clinical, and emeritus) that have been extended through a reappointment must have a position in the unpaid academic job profile.

TERMINATED WORKERS

- Academic appointments for terminated workers need to be ended in Workday.
EXPIRED POSITION (1033)

Workers whose positions have expired will be excluded from the AP Census.

When a position expires, terminate in Workday, or extend through reappointment action.

If position has ended, all academic appointments also need to be ended.

*To resolve this type of issue:* Determine whether the position is active, then take action on the position.

*Actions may include termination or data change.*
## Examples

### Courtesy Faculty
- Academic personnel with appointments in the affiliate, clinical non-salaried, and emeritus tracks, should be moved to positions with the Unpaid Academic job profile when they are no longer in paid status.

### Delayed Reappointments
- Job changes for workers whose positions being extended through a reappointment need to include all required documents.
OAP RESOURCES

Academic Personnel Census: An Introduction
Workday Academic Personnel Audit Reports
AP Census Preparation FAQ
Sextant: A New Academic Appointments and Positions Guidance Tool
ISC RESOURCES

User Guides

Admins’ Corner

• Admins’ News
• Monthly Tasks
PEOPLE

Academic HR Specialists

ISC Tier 2 Academic Service Partners

Me (Carla)