

# 2023 CENSUS PREPARATIONS

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UNIVERSITY *of* WASHINGTON

OFFICE OF ACADEMIC PERSONNEL

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# Agenda

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What is the AP Census?

What are the goals for the census preparations?

How will we achieve those goals?

What is in the audit reports?

What are the common data issues?

Resources

# What is the AP Census?



# Overview

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Built annually by OAP

Snapshot reflects UW academic personnel population on October 31 of each year

Allows tracking of changes to the academic personnel population year over year



# How It's Used

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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

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Who is included in this population?

- People with academic appointments on October 31

*and*

- 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

➤ *If the person does not have a position in the Academic Personnel job family group, then the worker's primary position is included*



# What are the Census Prep Goals?



# Academic Appointment Goals

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For all individuals with active academic appointments on October 31:

- Primary appointment entered
- Rank corresponds to the worker's job profile
- Academic appointing unit is valid
- Roster percent is valid (for titles requiring a roster value)
- Appointment end date is valid for the academic rank

# Position Goals

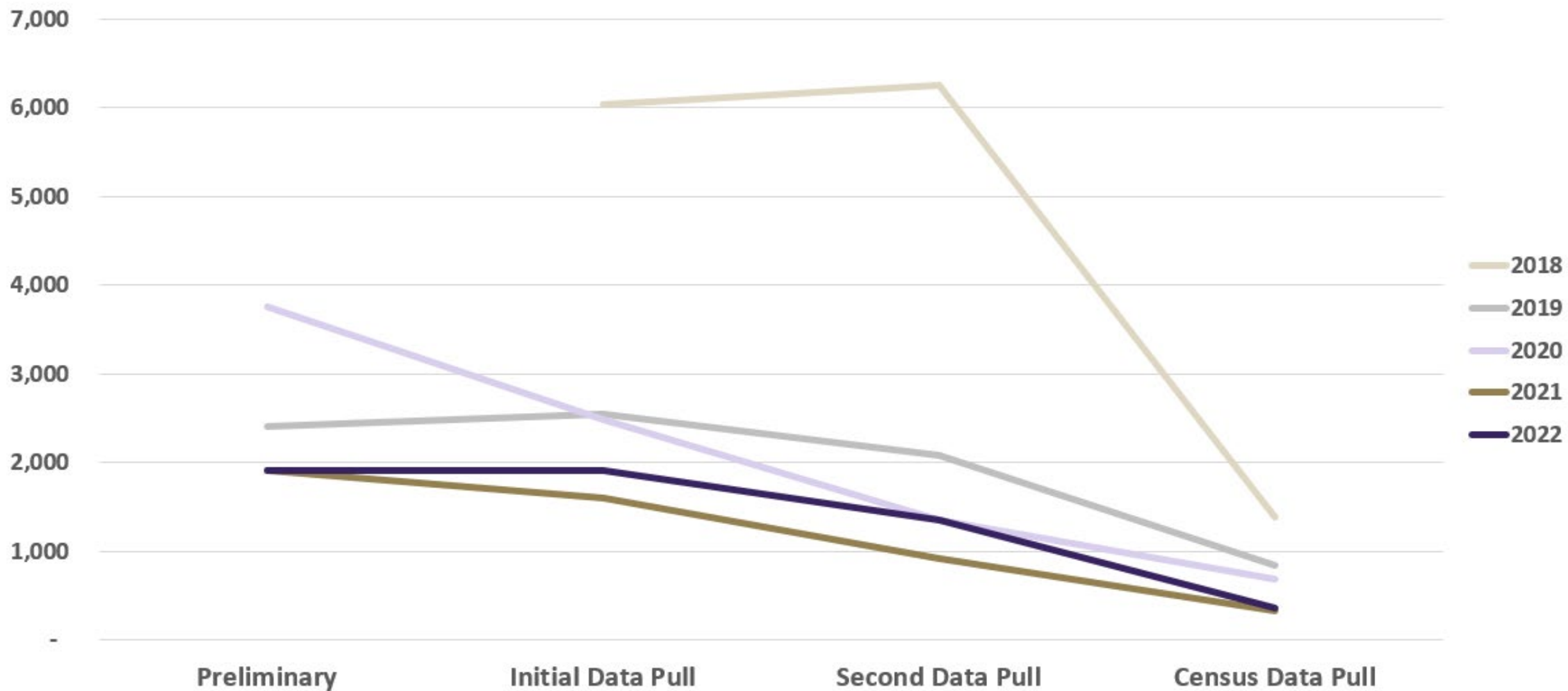
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For all individuals with active positions in the Academic Personnel job family group on October 31:

- Position entered
- Job profile that corresponds to worker's primary academic rank
- End employment date is valid for job profile



## Total Issues by Data Pull





# Status as of August 7

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1742 individuals with appointment or position issues (2164 in 2022)

- Missing Academic Appointment: 1231
- Missing Academic Position: 67
- Expired Position: 777
- Missing Primary Appointment: 57
- Terminated or Contingent Worker: 48
- Rank Profile Discrepancies: 94
- Invalid Appointing Unit: 1
- Missing/Invalid Roster Value: 96
- Invalid Appointment End Date: 39
- Invalid Position End Date: 3

**All schools/colleges/campuses have issues**

**How Will We Get There?**



# 2023 Census Preparations Timeline

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- **Aug 15:** First appointment issues data delivery
- **Week of Aug 14:** First office hour session
  - Held weekly through October on Mondays at 3 using [Zoom](#)
- **September 15:** Second Merit [restricted entry period](#) ends
- **October 3:** First position issues data delivery



# Timeline continued

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- **October 31:** All transactions for academic personnel who will be active on October 31 need to be entered in Workday, with dean's office approvals
- **October 31:** Snapshot date
- **November 6:** Census data pulled from Workday
  - Units will be contacted regarding any discrepancies in the census data

# Keys to Success

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- Prioritize actions effective prior to 7/1/2023
  - *The UWFT cutover included changes that will need to be rescinded - the ISC will need time to process the rescind transactions and may need to reinstate some UWFT cutover changes.*
- Ensure transactions are complete and accurate
  - *Send backs will delay approvals and may result in Census errors*
- Ask questions during Office Hours
  - *The time is yours, please use it!*



# Audit Reports



# R0716.1: AP Census Academic Appointment Audit

## Academic Personnel Census Academic Appointment Audit R0716.1

**Instructions** Identifies academic appointments with census-impacting data issues.

**PURPOSE:**

This report allows units to identify academic appointments with data issues that may impact the AP Census. The included issues are those related to end dates (invalid or expired), roster values, appointing units, missing primary appointments, and missing positions.

This report should be run weekly during the census preparations window (August through October) to ensure all academic appointment data is complete and accurate on the AP Census snapshot date.

**PROMPT DETAILS:**

Select the academic rank(s), track type(s), academic unit(s), and/or School/College/Campus you would like to see data for.

Census Date



10/31/2022



Academic Rank



Academic Track Type



Academic Unit



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



Filter Name

Manage Filters

1 Saved Filters ▾

Save

OK

Cancel



# Academic Appointment Issues

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- Missing positions
- Terminated/contingent workers
- Missing primary appointments
- Expired appointments
- Invalid end dates
- Invalid appointing unit
- Missing/invalid roster

# R0716.2: AP Census Position Issues

## Academic Personnel Census Position Issues R0716.2

**Instructions** This report identifies positions in the 01 - Academic Personnel job family group with census-impacting data issues.

**PURPOSE:**

This report allows units to identify positions in the 01 - Academic Personnel job family group with data issues that may impact the AP Census. The included issues are those related to end dates (invalid or expired), and missing academic appointments.

This report should be run regularly during the census preparations window (August through October) to ensure all academic appointment and position data is complete and accurate on the AP Census snapshot date.

**PROMPT DETAILS:**

- Please select the job profile(s), job family(ies), and/or Supervisory Organization you would like to see data for.

**PLEASE NOTE:** The report output includes expired positions in the 01 - Academic Personnel job family group.

Census Date

\* 10/31/2022



Supervisory Organization

\*



Include Subordinate Organizations

☐

Job Family



Job Profile



Filter Name

Manage Filters

1 Saved Filters



Save

OK

Cancel



# Position Issues

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- Invalid rank/profile combination
- Expired positions
- Invalid end dates
- Missing academic appointments

# Common Data Issue Areas



# Missing Primary Appointment

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## Common data issues

- No active academic appointments
- No active primary appointment

## Root causes

- Worker terminated
- Primary appointment ended, secondary appointment not updated

## Actions

- End lingering academic appointments
- Update a secondary appointment to change the identifier



# Fixed Term Positions with Upcoming End Dates

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## Common data issues

- No active position on 10/31
- Academic appointment end date prior to 10/31

## Root causes

- Reappointment date is in the future

## Actions

- Update or end the academic appointment as soon as the reappointment decision has been made
- Update or end the position as appropriate based on the decision and the title.



# Emeritus, Affiliate & Clinical Non-Salaried Faculty

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## Common data issues

- Rank/Profile discrepancies
- No active position on 10/31
- Expired academic appointment

## Root causes

- Fall outs from Reappointment EIB not loaded
- Job change prohibited due to Merit restricted entry period

## Actions

- Verify status of academic appointment (reappointment decision)
- Verify academic rank and job profile

➤ **Faculty reappointed in spring can only be terminated if they resign their appointment**



# 9-Month Faculty Promoted in 2023

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## Common data issues

- Rank/Profile discrepancies
- No active position on 10/31

## Root causes

- Appointment updates are complete, but the position updates won't be loaded until September

## Actions

- None until position updates are loaded (mid-September)
- **Promotion actions will be loaded via EIB**



# Roster Value

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## Common data issues

- Missing roster value
- Roster value below minimum

## Root causes

- Missing data entry
- Value not entered correctly

## Actions

- Update academic appointment to correct roster value



# Clinical and Affiliate Titles

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## Common data issues

- Rank/profile discrepancies

## Root causes

- Incorrect job profile assigned when moving into paid status
- Appointment track changed; job change not processed

## Actions

- Verify rank level and track, then make the appropriate update(s)



# Other Issues

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## Invalid Appointing Unit

- Primary academic appointments must be in an academic appointing unit
- For departmentalized units, the school/college/campus is not an academic appointing unit

## End Dates (appt or position)

- Appointments and positions for indefinite titles must not have an end date
- Appointments and positions for fixed-term titles must have an end date that does not exceed the maximum term for the title

# Resources



# OAP Resources

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[Academic Personnel Census: An Introduction](#)

[Workday Academic Personnel Audit Reports](#)

[Annual Audit Schedule](#)

[AP Census Preparation FAQ](#)

[Sextant: An Academic Appointments and Positions Guidance Tool](#)

# ISC Resources

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[User Guides](#)

[Admins' Corner](#)

- Admins' News
- Monthly Tasks

# People

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## Academic HR Specialists

ISC Tier 2 Academic Service Partners

Me (Carla)



Thank you!