FALL ADMINISTRATORS FORUM

SEPTEMBER 10, 2019
AGENDA

◦ UW Climate Survey
◦ UAW Postdoc Union Implementation Update
◦ Updated Titles
◦ New Self-Service Reports
◦ Electronic Document Management (2-step processes)
◦ AP Census Preparation
◦ Reminders and Announcements
UW CLIMATE SURVEY

ERIN ROWLEY
Director / Communications
Office of Minority Affairs & Diversity
POSTDOCTORAL SCHOLAR UPDATE

Process changes
Postdoctoral scholar job profiles
Compensation
Resources
PROCESS CHANGES

Starting September 1, 2019, use new titles
- Submitted in Workday on/after September 1
- Hire and reappointment paperwork
- UPDATED: postdoctoral data sheet and title change request forms
- NEW: offer letter and reappointment templates

Workday will not reflect new titles/changes at this time
- After configuration, titles will route based on multi-year eligibility
- Multi-year eligible (postdoctoral scholars, postdoctoral scholar-fellows, and interim postdoctoral scholars) will route to Academic HR
- Annual (affiliate postdoctoral scholars) will route to ISC
POSTDOCTORAL SCHOLAR JOB PROFILES

Old titles will be replaced with new ones and will no longer exist
  ◦ Research Associate, Senior Fellow, Senior Fellow-Trainee, and Research Associate-Trainee

No non-union postdocs
  ◦ All postdoctoral scholars, postdoctoral scholar-fellows, and interim postdoctoral scholars will be in the union

Individuals who are **excluded** from the bargaining unit and who are in one of the existing four titles will be moved into different titles to avoid confusion with postdoctoral scholars
POSTDOCTORAL SCHOLAR JOB PROFILES

Current Titles
- Research Associate
- Senior Fellow
- Research Associate-Trainee
- Senior Fellow Trainee

New Titles
- Postdoctoral Scholar
- Postdoctoral Scholar-Fellow
- Interim Postdoctoral Scholar
POSTDOCTORAL SCHOLAR JOB PROFILES

Term Limits

- Initial appointment must be at least one year, no exceptions
- Can be hired/reappointed for more than one year, no more than five total years of postdoctoral scholar experience
- Exceptions in certain circumstances as outlined in the collective bargaining agreement (CBA)

No more combo titles

- Senior fellow/senior fellow-trainees who meet bargaining unit definition will become postdoctoral scholar-fellows
Conditional Postdoctoral Scholars

- Postdoctoral scholars may be appointed on a conditional basis for up to one year if they have completed all degree requirements and are awaiting conferral.
- Postdoctoral Scholar-Conditional and Postdoctoral Scholar-Fellow-Conditional titles.
- Conditional is a designation and not officially part of their title. For Workday purposes, it will be an available job profile.

Interim Postdoctoral Scholar

- Recent UW doctoral graduates who are completing an existing project.
- Six months maximum.
POSTDOCTORAL SCHOLAR ADJACENT JOB PROFILE

Affiliate Postdoctoral Scholar-NEW TITLE

- Individuals who are employed and paid directly by HHMI, Fred Hutch, VA, or US Military are excluded from the bargaining unit at UW
- Will have a courtesy appointment with UW only, considered unpaid academic
- Annual appointment on the academic calendar
COMPENSATION

No compensation changes for current postdoctoral scholars unless otherwise approved by OAP

All new postdoctoral scholars must meet CBA minimums

Current senior fellows who meet certain qualifications will receive a one-time 2% increase
  ◦ Reflected on 9/25 paycheck

Target date for titles ready in Workday—9/20/2019!
LEAVES AND TIME OFF

Sick Time Off
- 1 day of paid sick leave for every month of appointment, front-loaded

Vacation Time Off
- 21 days of paid vacation frontloaded at the beginning of each annual appointment period

Bereavement Time Off
- Three days of paid time off for the death of a family member

Personal Holiday
- One day off per calendar year

More Information
- Article 24 of UAW Collective Bargaining Agreement
RESOURCES

UAW Contract: https://hr.uw.edu/labor/unions/uaw/uaw-postdoc-contract

Visiting Scientist-UPDATED!

- Non-academic experts/professionals
- Independent (non-mentored) research, observation, and/or consultation
- May not teach or be the instructor of record
- Not performing duties that would qualify them as a professional staff research scientist or as a postdoctoral scholar
- Not enrolled as a student
- Two-year maximum in title
POSTDOCTORAL SCHOLAR Q&A

Question: How is one year determined for postdoctoral scholar appointments?
Answer: That would be 12 months based on when the scholar came in, not on the academic year.

Question: Would a new offer letter need to be given once someone moves out of the conditional designation?
Answer: No, it would not because this is already clearly stated in the offer letter. Just be sure to use the new offer letter template posted on the titles and ranks pages.

Question: How is an interim postdoctoral scholar different than a research scientist? This title has been used for UW scholars completing postdoctoral work in the past?
Answer: If they're doing postdoctoral work and if they meet the postdoctoral scholar definition, they should be in Interim Postdoctoral Scholar title.

Question: Will the hold on compensation end on Sept 20th?
Answer: That would be ideal. If Workday is ready by then, it’s likely the hold will be lifted. More information about this is forthcoming.
Question: Can people in the Affiliate Postdoctoral Scholar title take classes using the tuition exemption?
Answer: No, they cannot.

Question: Will postdoctoral scholars be required to meet the salary minimum outlined in the collective bargaining agreement (CBA) upon reappointment?
Answer: Yes, once workday is ready.

Question: If a postdoctoral scholar is being renewed will their existing accrued leave carry forward?
Answer: Yes, be sure to check the CBA for more information.

Question: Will postdoctoral scholars be entering their own leaves in Workday?
Answer: Yes, that is currently the plan. Be sure to take a look at the CBA guidelines on how to request time off. Also, processes such as FMLA and Leave Without Pay are not changing.
**NEW SELF-SERVICE REPORTS**

R0361: Expired & Expiring Academic Appointments

R0469: Academic Workers Without Primary Academic Appointments

R0343: Appointments Without Valid Appointment Identifiers

R0344: Appointments in Non-Academic Appointing Units

- Recommendation is to run these monthly
IDENTIFY EXPIRED/EXPIRING & MISSING APPOINTMENTS

R0361: Expired & Expiring Academic Appointments
- Modification of “Upcoming Academic Appointment End Dates”
- Returns all appointments with end dates in the past or next 90 days (from run date) that have not been ended
- Prompts include:
  - Academic Rank
  - Academic Track Type
  - Academic Unit
  - Schools/Colleges/Campuses

- Academic Appointments need to be ended when a worker is terminated or changes jobs.

R0469: Academic Workers Without Primary Academic Appointments
- Returns all workers with an active position in the Academic Personnel job family group on the selected date, who do not have an active Primary Academic Appointment on that date.
- Prompts include:
  - Snapshot Date
  - Supervisory Organization
  - Include Subordinate Organizations

- Academic Workers who are required to have academic appointments are required to have one assigned the appointment identifier “P – Primary”
IDENTIFY APPOINTMENTS WITH INVALID DETAILS

R0343: Appointments Without Valid Appointment Identifiers
  ◦ Returns all active appointments with invalid appointment identifiers
  ◦ Prompts include:
    ◦ Academic Unit
    ◦ Schools/Colleges/Campuses

Valid Appointment Identifiers are included in Sextant.

R0344: Appointments in Non-Academic Appointing Units
  ◦ Returns all active academic appointments with a non-academic appointing unit entered as the Academic Unit
  ◦ Prompts include:
    ◦ Academic Unit
    ◦ Schools/Colleges/Campuses

For departmentalized schools, colleges, and campuses, only administrative appointments can be made to the school/college/campus.
REPORTS PLANNED FOR DEVELOPMENT IN AY2019-20

- Invalid appointment end dates
- Invalid position end dates (Academic Personnel Job Family Group only)
Question: I'm having trouble adding a new primary appointment if the other appointment hasn’t been ended yet.

Answer: Workday is configured to allow only one primary academic appointment at a time. We will look into ways that configuration could be changed to facilitate data entry, but in the meantime changes need to be entered and approved in Workday sequentially: end academic appointment (entered and approved). Then add academic appointment (entered and approved).

Question: If I work in a 12-month school, and I have an academic personnel employee whose start date is on or after January 2, can I use an end date that is 18 months out?

Answer: Yes, this is possible because with a January 2 or later start date the person would be within the 6-month window of notice of reappointment as outlined in the faculty code.
Question: What identifier should I use to select the Supervisory Organization in Workday Report 0361?

Answer: The organizations you have access to will be listed under the “My Organizations” header in the prompt display. Beyond that, we recommend two strategies:

Look at the summary screen of a worker in the sup org you are looking at, and use that to search, or

Type in the name of the department or college you are looking at, a parentheses and the last name of the chair or dean for example: “Medicine (Ramsey” or “History (Young”

We will ask the ISC to include this in a future training or resource.
ELECTRONIC DOCUMENT MANAGEMENT (TWO-STEP PROCESSES)

◊ Electronic Document Management System (EDM)
  ◦ Went live on 7/1/2019
  ◦ For all business processes approved by AHR that have associated documents, those documents are transferred into EDM for permanent storage and deleted from Workday

◊ Some Workday processes require two BPs – one on the position and one on the appointment
  ◦ This presents us with an issue – when do we upload the documents into the EDM?
  ◦ Answer: Only when both BPs have been reviewed and approved

◊ Please submit both Workday processes together
## Electronic Document Management
### (Two-Step Processes)

<table>
<thead>
<tr>
<th>Position Actions</th>
<th>Appointment Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>“New Hire” BPs</strong></td>
<td><strong>“Add Academic Appointment” BPs</strong></td>
</tr>
<tr>
<td>Hire</td>
<td>Any of the following are applicable</td>
</tr>
<tr>
<td>Start Additional Job</td>
<td>Add Academic Appointment</td>
</tr>
<tr>
<td>Lateral Move</td>
<td>Hire</td>
</tr>
<tr>
<td>Transfer</td>
<td>Rehire</td>
</tr>
<tr>
<td><strong>“Data Change” BPs</strong></td>
<td><strong>“Update Academic Appointment” BPs</strong></td>
</tr>
<tr>
<td>Clock Adjustment</td>
<td>Any Clock Adjustment BP</td>
</tr>
<tr>
<td>Reappointment</td>
<td>Reappointment</td>
</tr>
<tr>
<td>Promotion</td>
<td>Any Promotion BP</td>
</tr>
</tbody>
</table>
AP CENSUS PREPARATION

- What is the AP Census?
- What preparations are needed?
- What resources are available to support preparations?
WHAT IS THE AP CENSUS?

AP Census is built annually using data as of October 31

- Includes all individuals with an active academic appointment and/or position in the Academic Personnel job family group
- Three data sources are used:
  - A list of all active primary academic appointments on October 31
  - A list of all positions in the Academic Personnel job family group effective on October 31
  - A list of all primary positions in Workday effective on October 31

Used to generate:

- OAP Fact Sheet
- The national Integrated Post Secondary Education Data System (IPEDS) report, which gathers information from every post-secondary institution participating in federal student financial aid programs
- American Association of University Professors (AAUP) Faculty Salary Survey
- Office of Planning and Budgeting (OPB) Faculty Dashboard
- Affirmative Action Plan (governed by the OFCCP)
- Campus requests for faculty data
- Public requests for faculty data submitted via the Public Records Office
WHAT PREPARATIONS ARE NEEDED?

- Enter all new academic appointments in Workday
- Enter all new positions for academic workers in Workday
- End all academic appointments for terminated academic workers (R0361 can help with this)
- Terminate any academic workers who are no longer affiliated with the university (R0321 can help with this)
- Verify that all academic workers have an active primary appointment on October 31st (using R0469)
- Verify that all academic appointments are in the correct academic unit (using R0343)
- Verify that all academic appointments have valid appointment identifiers (using R0344)
- Verify that all academic appointments and positions correspond (using Sextant)

➢ Any transactions should be entered in Workday (with dean/chancellor approvals) by October 25.
WHAT RESOURCES ARE AVAILABLE?

- Lists of individuals without Primary Academic Appointments were distributed on August 27
- Lists of individuals without Academic Positions will be distributed the week of October 7
  - Updates to the August 27 data files will be provided at this time
- Flow charts to assist in evaluating appointments are available on the OAP website
- Reports in Workday:
  - R0361: Expired & Expiring Academic Appointments
  - R0469: Academic Workers Without Primary Academic Appointments
  - R0343: Appointments Without Valid Appointment Identifiers
  - R0344: Appointments in Non-Academic Appointing Units
  - R0321: Upcoming Employment End Dates
- Sextant: ap.wa.edu/sextant
AVAILABLE RESOURCES (CONTINUED)

◦ We will be hosting virtual office hours sessions throughout September and October. Remaining dates/times are:
  ◦ Tuesday, September 17, 3:30pm
  ◦ Friday, September 27, 10:30am
  ◦ Tuesday, October 1, 9:30am
  ◦ Thursday, October 10, 2:30pm
  ◦ Monday, October 14, 3:30pm
  ◦ Thursday, October 24, 9:30am

◦ Census Preparations FAQ – will be published to the OAP website this week.
◦ The Academic HR team and the ISC HCM Tier 2 team – we are happy to help via email or to schedule time to meet in person.
REMINDERS AND ANNOUNCEMENTS

- Administrative appointments with ADS
  - Submit both business processes at the same time, prior to the start date. This will ensure appointment is approved by the Board of Regents and ADS is added to compensation proactively.

- Updates to the OAP website Academic HR section
  - Relocation Incentive Payment (new form)
  - Endowments (required documentation)
  - Updated contacts page

- New OAP central phone number (206) 221-UWAP (8927)
- Non-mandatory promotion candidate lists due to AHR September 6
- Promotion & Tenure Prep training on September 17
THANK YOU FOR JOINING US!

The slides and a video link will be available on the Office of Academic Personnel website.