

Administrators Forum Autumn 2023

September 13, 2023



UNIVERSITY *of* WASHINGTON
OFFICE OF ACADEMIC PERSONNEL
acadpers@uw.edu | <http://ap.washington.edu/>



And just like that, it's September!

Welcome the return of students and faculty and get ready for the new quarter.

Agenda

- Changes to Retention Request Process
- Sabbatical
- Wrapping Up FY24 Merit
- FY24 Promotion & Tenure
- OAP/UWHR changes coming in Autumn Quarter 2023
- Census Preparations
- General Reminders and Key Dates

Changes to Retention Request Process

Retention Request Process Changes

Changes intended to:

- **Clarify** requirements and expectations
- **Support** better analysis
- **Expedite** provost review
- **Communicate** outcome more quickly

Retention Request Process Changes

Key changes:

- Revised form
- Preemptive request requires evidence individual is being **actively pursued**
- Competitive request requires evidence of **an offer** or that **offer is imminent**
- Unit must provide **comparative data**
- Request routed to Peg Stuart (mjstuart@uw.edu) first, then **processed in Workday after provost approval**

Retention Request Process Changes

Process details, submission requirements and **revised form** are available on OAP's [Retention Salary Adjustments](#) webpage.

Questions?

Sabbaticals

2023-24 Sabbaticals

Begin placing faculty and librarians approved for Autumn Quarter sabbatical on Sabbatical Leave in Workday

OAP recently sent all units a spreadsheet identifying:

- Those approved for sabbatical starting fall quarter
- Start and end dates of the approved sabbatical
- Number of quarters approved
- Salary support percentage

2024-25 Sabbaticals

Faculty and librarians become eligible for sabbatical no earlier than their seventh academic year of service to the UW or their seventh academic year of service after returning from a previous sabbatical.

Those with six years' of service can apply this year for a sabbatical to occur in 2024-25. **The application deadline is January 12, 2024.**

Sabbatical [forms and web content](#) are updated.

Return to Service

Following the sabbatical, the individual must **return to service** at the appointment percent held prior to sabbatical.

The return-to-service obligation starts in the academic year **following** the year in which the sabbatical occurred.

Failure to return for the requisite period creates an obligation on the faculty member's part to **repay the University** any state and locally funded remuneration received during the sabbatical leave

This return to service obligation is noted on the application and on OAP's [Sabbatical Leave](#) webpage.

Return to Service

The duration of the return-to-service obligation depends on whether the faculty member took a full or partial sabbatical. Faculty who take a full sabbatical are required to return for a full academic year.

A **full sabbatical** is any of the following:

- 1 quarter sabbatical at 100% salary support
- 2 quarter sabbatical at 75% salary support
- 3 quarter sabbatical at 67% salary support

Faculty who take less than a full sabbatical have a prorated return obligation. Faculty who distribute their sabbatical over multiple years will have their return obligation distributed over multiple years.

Retirements/Resignations

When processing faculty terminations, please **review** the Workday record for recent sabbaticals that might suggest a payback obligation

Faculty and librarians planning to retire/resign within the next two years may want to **consider requesting a leave without pay in lieu of a sabbatical.**

Sabbatical Resources

- Sabbatical Leave - <https://ap.washington.edu/ahr/policies/sabbaticals/>
- Service Obligation - <https://ap.washington.edu/ahr/policies/sabbaticals/sabbatical-service-obligation-audit/>
- ISC User Guide - https://isc.uw.edu/user-guides/loa_sabbatical/

Wrapping Up FY24 Merit

Validate

Increases have been uploaded into Workday and units need to confirm that approved merit increases have loaded as intended into Workday.

- **Confirm approved increases have loaded as intended**
- Run “Merit Adjustment Validation R0537”
- Review discrepancies with dean/chancellor office administrator
- Confirm the details on the official merit file and approvals
- Submit Corrections/Changes ASAP, by Sept. 15

Corrections

A **correction** is in order when a merit recommendation was entered on the official merit file and approved by OAP, but did not load into Workday correctly.

- Verify with your dean/chancellor office what was approved
- Submit **correction requests** as soon as possible
- Email ischelp@uw.edu
- Subject: "MERIT CORRECTION"
- Include: Name, EID, Position Number, Full-time Monthly Salary Rate, Increase percentage

Changes

In the **extremely rare** need for changes *after* approval by OAP

- Email ischelp@uw.edu
- Subject: "MERIT CHANGE"
- Include: Name, EID, Position Number, Full-time Monthly Salary Rate, Increase percentage, Reason
- Include a **description of and rationale** for the requested change, and an attestation that the dean/chancellor has approved the revision.
- If approved, OAP will work with the ISC to process the change.

End of the Restricted Entry Period!!

Initiate Compensation Change, Change Job and Change Job Data Change transactions

- In-Flight and future dated compensation transactions blocked the upload and needed to be canceled and rescinded
- Run “**R0569 Business Process Transactions Details**” to identify rescinded & cancelled transactions
- Submit Workday transactions for September 1-15 pay period
- Payroll deadline September 19 at 5:00 pm

FY24 Promotion / Tenure

Changes

- Moving to fully electronic! (Ring in AY 2023-24)
- All promotion and award of tenure decisions will be communicated on [set dates](#)
 - We will no longer provide earlier informal notifications
- The [pre-record submission checklist](#) has been updated.
 - Candidates must be compliant with all university policies and have completed [required employee training](#), including Title IX training

Important Dates - Deadlines

Submission deadlines for AY 2023-24 are:

- Dec 15 - Mandatory promotions
- Feb 2 - Non-mandatory promotions
- Mar 1 - Clinical and Affiliate promotions
- Apr 12 - Librarian promotions

See [Promotion and Tenure Due Dates](#)

Important Dates - Notifications

- Mar 31 - Mandatory Faculty Promotion/Tenure Notifications
- May 31 -
 - Clinical and Affiliate Faculty Promotion Notifications
 - Non-mandatory Faculty Promotion/Tenure Notifications
 - Librarian Promotion Notifications

Promotion / Tenure Resources

- P&T Training – September 20, 2023. Register at <https://ap.washington.edu/ahr/resources/workshops/>
- [Preparing for the 2023-24 P&T Cycle](#)
- [Promotion and/or Tenure](#) page

9-Month Service Period Promotions

As a reminder that UW is never “done”, the ISC will process and load 9-month service period promotions into Workday effective September 16 by the end of this week

- Updates to job profiles, compensation and academic appointment
- Any promotions effective July 1 already in Workday will not be impacted
- Validate the upload and email acadpers@uw.edu with any issues

OAP/UWHR Changes

OAP/UWHR Collaboration

Shared strategic goals:

- Enhance consistency across different employee types
- Consolidate similar responsibilities in one office
- Reduce confusion about services provided by UWHR and OAP
- Allow OAP to deepen focus on programs that further support faculty and academic personnel success
- Aug 30 email from Vice President for UWHR and Vice Provost for the Office of Academic Personnel

Medical, Parental, Military and Domestic Violence Leave

Effective September 27, 2023, transitioning administration to UWHR Campus HR Leave Specialist Team

- Family and Medical Leave Act (FMLA)
- Paid Family and Medical Leave (PFML)
- UW Paid Sick Leave
- Less common leaves for Military service and Domestic Violence

Leaves Remaining with OAP

All other types of leave remain with OAP. Leave categories and related support that are unique for academic personnel and faculty

- Sabbatical leave
- Personal leave without pay
- Outside work
- Hiatus
- Reduced responsibility
- FTE changes in conjunction with leave

Office of Equal Opportunity and Affirmative Action (EOAA)

Effective September 27, 2023, transitioning EOAA to UWHR

- Institutional point of contact for federal and state agencies for equal opportunity and affirmative action compliance
- Demographics reporting
- Recruitment waivers for academic personnel and professional staff
 - Academic personnel waivers also reviewed by the vice provost

Coming Soon – Date TBD

Employee Relations for Contract Covered

Employee relations and labor relations for **contract covered** academic personnel will transition to UWHR

Centralize supports for all contract-covered employees

Populations in this transition are:

- American Federation of Teachers (AFT) Extension lecturers
- United Auto Workers (UAW) Postdoctoral Scholars
- Resident and Fellow Physician Union (RFPU)
- Librarians represented by Service Employees International Union (SEIU 925)

More information

HR Community of Practice Policy and Practice Meeting 9/14 10:30am
<https://washington.zoom.us/j/96475316600>

Web updates live by 9/25

- OAP Website <https://ap.washington.edu/>
- UWHR Website <https://hr.uw.edu/ops/leaves/>

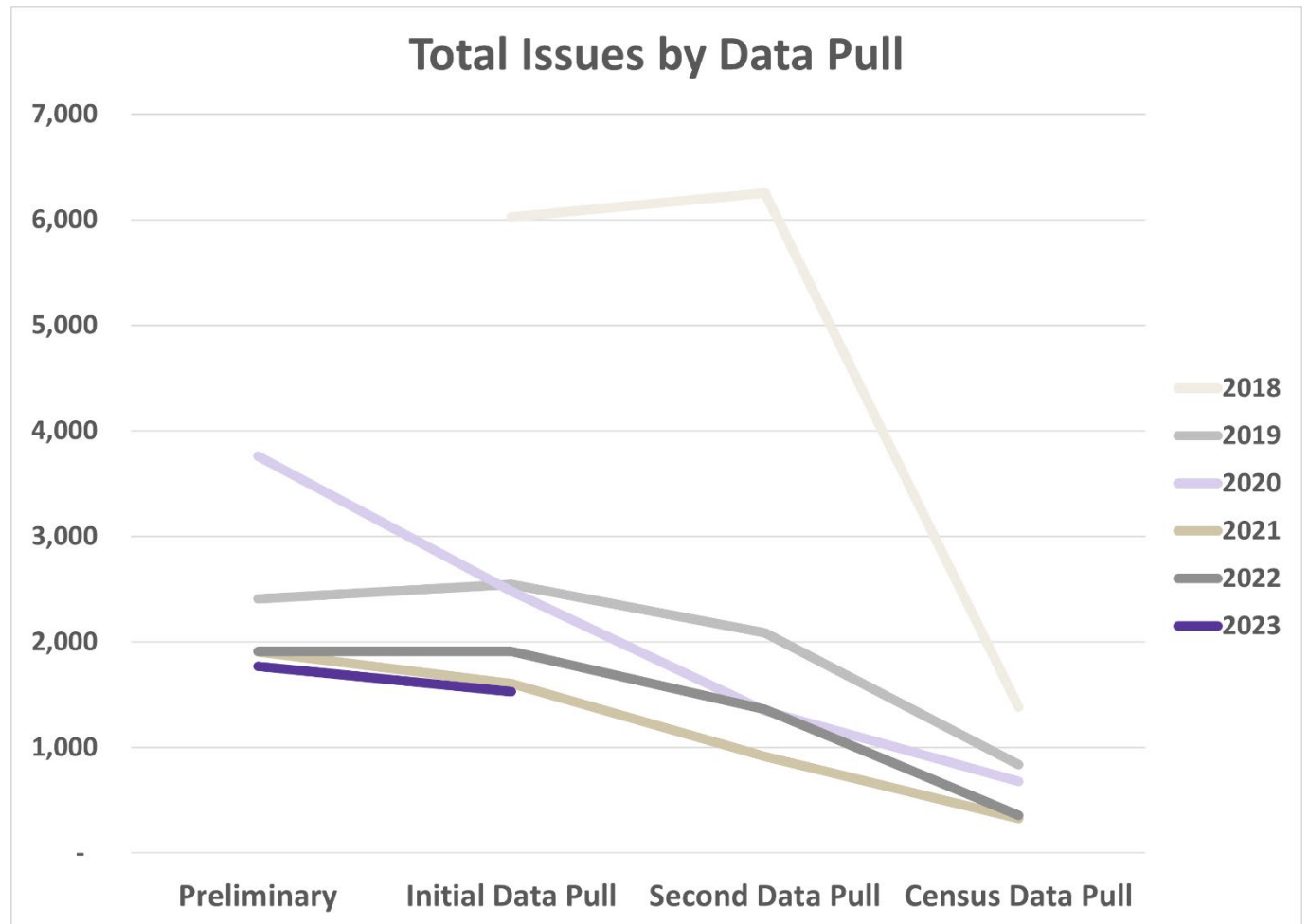
OAP/UWHR Email to all academic personnel 9/25

Census Preparations


Current State of Data

- As of August 7:
 - 511 appointment issues
 - 1675 position issues
 - 1742 individuals with appointment or position issues
- As of September 8:
 - 593 appointment issues
 - 1458 position issues
 - 1528 individuals with appointment or position issues

Progress to Date



2023 Census Preparations Timeline

- **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 12:** Second Merit [restricted entry period](#) ends
- **October 3:** First position issues data delivery

Timeline continued

- **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

Questions?

Reminders

Sexual Misconduct Declaration

- As of **October 1, 2023**, AHR will no longer accept previous version “paper” forms for the SMD process
- Please use Ideal Logic documentation for all hiring and reappointment packets submitted to workday
- See [Sexual Misconduct Disclosure Process](#) for details

Return from Summer Hiatus

ISC will mass upload “Return Worker from Leave” on Friday

Please verify:

- FTE
- Compensation amount
- Compensation End Date
- Appointment, Position and Employment End Dates

Fall Quarter Hiring & Reappointment

Reappointments with Changes

Please upload into workday written acknowledgement from appointee if any of the following occurs with the reappointment:

- Change in appointment length (e.g. 3-year appointment with a 1-year reappointment)
- Change of supervisor
- Change in general duties/responsibilities (i.e. an additional quarter being added that wasn't already acknowledged)
- Change in FTE

Business Processes for Manual Entry

Academic Appointment

- *Update Academic Appointment > Update Academic Appointment > Reappointment*

Position

- *Change Job > Data Change > 02 –Reappointment (Academic Only)*

Compensation

- *Compensation > Base Pay Change > Extend Compensation Actual End Date*

Key Due Dates on the Horizon

Remember to frequently review the OAP's **Due Dates Calendar**

- Sep 15 Return faculty from Summer Quarter sabbaticals
- Sep 16 Enter approved sabbaticals for Autumn Quarter
- Sep 20 Promotion & Tenure training
- Sep 27 Visa Basics 1 (Visa Types) training
- Oct 11 2024 Year at a Glance Workshop
- Oct 16 Board of Regents submissions for November
- Oct 19 Sabbaticals process and policy training
- Oct 25 Visa Basics 2 (Processes & Tools) training
- Oct 31 Complete data clean-up for UW's annual census
- Nov 15 Reappointments process and policy training
- Nov 15 Run November audit reports
- Dec 13 Winter Administrative Forum



Thanks for
Attending!