

QUARTERLY ADMINISTRATORS FORUM SPRING 2022

April 26, 2022



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

AGENDA

- Merit prep (Peg)
- Academic review dates (Jim)
- Changes to comp grade data (Carla)
- Tips for navigating the OAP website (Mandy)
- Updates (Kimberlee)

PREPARING FOR MERIT

HAS 9/1/22 MERIT BEEN FORMALLY AUTHORIZED?

- [Merit planning letter](#) issued on March 16, 2022; **final guidance has not been released** and is subject to adoption by Board of Regents
- Units should proceed with annual performance and merit review processes

WHY IS IT IMPORTANT TO PREPARE NOW?

- Merit preparation and load process is complex
- To support accuracy and meet deadlines, **units must start data clean-up** in advance of formal merit authorization
- Success depends on accurate merit files fed by accurate Workday data
- Cleaning data **saves time, avoids headaches**
- Potential consequences of bad data:
 - Non-compliance with policy
 - Overpayment or underpayment
 - Disgruntled employees
 - Extra work in September to address errors/corrections

WHEN AND HOW IS DATA PULLED INTO THE MERIT FILE?

- On **August 1**, Office of Planning & Budgeting (OPB) pulls Workday data to create official merit file; sends file to each dean's office
- File uses **prospective snapshot of August 31**; anyone predicted to be in a merit-eligible job profile with comp comes through on the report
- Workday data errors diminish the accuracy of merit file
- To support the August 1 data pull, **data clean-up must be completed by July 31**

WHAT DATA ISSUES COMPLICATE THE MERIT PROCESS?

1. Records with a compensation plan, but 0% FTE (one type of “zero comp”)
2. Records with some percentage of FTE, but a compensation end date effective prior to 9/1 (another type of “zero comp”)
3. Waiting until after August 1 to process a known termination with an effective date of/prior to 8/31

WHY IS ZERO COMP SUCH A PROBLEM FOR MERIT?

- Merit increases are calculated against base salary
- If pre-merit base salary is \$0, post-merit base salary will be \$0 (**\$0 + any% = \$0**)
- Except in certain leave situations, academic personnel who are not being paid should be in an unpaid job profile or terminated
- “Holding” a position by zeroing out the FTE is not permitted and could be in **violation** of state regulations

HOW CAN I AVOID OR CLEAN-UP ZERO COMP?

Tips to avoid zero comp:

- Ensure 9-month academic appointees with Autumn 2022 offer letters are put on [summer hiatus](#)
- Process terminations where appropriate
- Ensure affiliate and clinical non-salaried faculty are returned to unpaid academic job profiles when no longer being paid

Cleaning up zero comp:

- Run **R0536: Merit Data Audit Report**, available in Workday
- Where appropriate, extend compensation and/or employee end dates for appointees continuing in their positions

WHY SHOULD I PROCESS AUGUST TERMINATIONS BEFORE 7/31?

- Merit-eligible academic personnel who are **active on 9/1 are due merit**, even those set to terminate shortly thereafter
- Provost's office has to **hand-check** every academic personnel appointee precluded from merit with the reason code "ineligible" or "precluded"
- This slows down the merit process significantly
- Those with processed terminations will not come over on the merit file pulled on August 1, which will make the file shorter and reduce the time for review

HOW CAN I AVOID AUGUST TERMINATION ISSUES?

Tips to avoid August termination issues:

- If the termination is certain, go ahead and complete Workday business process by July 31
- When processing a termination, remember to end the academic appointment as well as the position

Cleaning up August termination issues:

- Run Workday reports to identify those who have appointments without positions or positions without appointments

Academic Appointees without Active Positions – R0612
Academic Workers with Primary Academic Appointments – R0469

ADDITIONAL REMINDERS TO SUPPORT THE MERIT PROCESS

- **Do not process comp changes** with an effective date of 9/1/22 or later until after merit is loaded
- **Run R0025: Compensation Change By Reason** report in Workday to identify retention recipients you intended to preclude
- Make sure you have documentation to support anyone dispositioned as ineligible or precluded

ADDITIONAL REMINDERS TO SUPPORT THE MERIT PROCESS

Rehires

Merit-eligible faculty employed at any point during AY21-22, terminated prior to 9/1/22, and rehired at any point during AY22 -23 **must have the equivalent of a merit increase** factored into the rehire salary.

Moving into Paid Status

Meritorious faculty in an unpaid academic job profile on 9/1/22 **are not due merit until they move into paid status** in a merit-eligible job profile; at that point, they must receive the equivalent of a merit increase

RESOURCES & CONTACTS

- If 9/1/22 merit is officially authorized, a process guide will be made available to campus as soon as practicable
- **Questions?** Contact:
 - Academic personnel merit process:
mjstuart@uw.edu
 - Pro staff merit process:
uwhrcomp@uw.edu (campus)
medcomp@uw.edu (med centers)

Thanks in advance
for your help in supporting
an efficient and accurate
merit process!

ACADEMIC REVIEW DATES

ACADEMIC REVIEW DATES




- Previously referred to as “Second Year Review”
- Workday field used for clock-managed academic personnel eligible for two three-year terms
 - Assistant Professor
 - Assistant Professor WOT
 - Research Assistant Professor
 - Professor Tenure Track*
 - Associate Professor Tenure Track*
 - APL Assistant Professor WOT
 - Clinical Assistant Professor Dental Pathway
 - Sr. Assistant Librarian

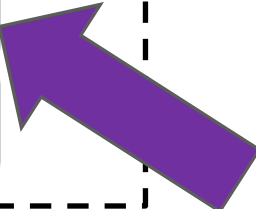
*Tenure Track titles are reappointed for a second 2-year term with tenure decision in the fifth year.

ACADEMIC REVIEW DATES

- Since 2017, have been using 3/16 of the second year as the date in this field for most titles
- **Example:** An assistant professor who started in 2021-22 would have their Academic Review Date set for 3/16/2023

▼ **Additional Appointment Information**

Adjusted Title Start Date	MM/DD/YYYY 
Academic Review Date	03/16/2023 
Track Start Date (Override)	MM/DD/YYYY 



ACADEMIC REVIEW DATES

- Rethinking the field after 5 years of Workday experience
- Field will reflect reappointment decision due date for second three-year term

ACADEMIC REVIEW DATES

Unit Administrators

- Use the following dates for Academic Review Date when entering academic appointment for relevant academic personnel
 - **6/15** of second year – Faculty w/ 9-month service periods
 - **6/30** of second year – Faculty w/ 12-month service periods
 - **6/30** of third year – Sr. Assistant Librarians

ACADEMIC REVIEW DATES

Existing Workday appointments

- AHR working with ISC to centrally change Academic Review Dates as necessary
- Action scheduled for June 2022

ACADEMIC REVIEW DATES

Reason code updates

- Updates to Workday reason codes relevant to Academic Review Dates has been scheduled
- Removing “second year” labels from reason codes

ACADEMIC REVIEW DATES

R0353.2: Academics with Approaching Academic Review Date

Set date range of 7/1/2021 – 6/30/2022 and select academic unit or school/college/campus

- Reappointment decisions must be made and documented for all academic personnel on report

ACADEMIC REVIEW DATES

Update Academic Appointment > Faculty Mandatory
Promotion Progress Decisions >

Academic Review

- Renew
- Postpone
- Non-Renew

CHANGES TO COMPENSATION GRADE DATA

COMPLETED WORK

- Compensation Grades updated
 - Previously: 8 compensation grades, no alignment to functional or operational groupings
 - Now: 12 compensation grades
 - Alignment to minimum pay rate groupings

COMPLETED WORK (CONTINUED)

- Compensation Grade Profiles added
 - Faculty compensation grades only (AP03, AP04, AP05, AP09, AP10)
 - Profiles align with service periods and different minimum rates
 - 12-month compensation grade profile (default value)
 - 9-month compensation grade profile

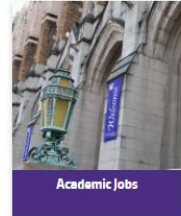
REPORTING UPDATES

- R0659: Academic Salaries Below the UW Minimum
 - Easier to run, fewer prompts, more accurate output
- R0708: Invalid Compensation Grade for Job Profile (Academic Only)
- R0708.1: Invalid Compensation Grade Profile for Academic Personnel
 - Better supports for postdoctoral scholars coming soon.

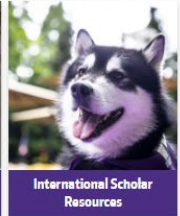
OAP WEBSITE TIPS



nel to be vaccinated



Academic Jobs



International Scholar Resources



Leaves Forms

Updates and Announcements

Further Updates to the Visa Request Tool

Tue, Mar 1, 2022
On Friday, March 4, OAP will update our visa request tool. To perform the update there will be a scheduled outage from 12-2pm when the tool, including all visa request forms, will be unavailable. Significant improvements include: New "Viewer" access for unit administrators: When submitting any visa request, and at any time after, unit administrators...

Updates to the Visa Request Tool

Mon, Nov 22, 2021
On Monday, November 29, OAP will update our visa request tool. To perform the update there will be a scheduled outage from 3-3:30pm when the tool, including visa request forms, will be unavailable. Significant changes include: All visa request forms will now collect the scholar's Employee ID (if known), allowing easier record-keeping and reconciliation The...

OAP Visa Processing Fee Increases

Training Calendar

Spring Cleaning: Improving UW Academic Personnel Data Quality in Workday
Wed, Apr 6, 2022, 1:30 pm
Online via Zoom

Green Card Basics
Thu, Apr 21, 2022, 2 pm
Online via Zoom

Quarterly Administrators Forum
Tue, Apr 26, 2022, 1:30 pm
Online via Zoom

Ad Drafting and Recruitment
Wed, May 11, 2022, 10 am
Online via Zoom

Lux Training
Wed, May 25, 2022, 1:30 pm
Online via Zoom

View all calendar events

Upcoming Due Dates

Spring Reappointment Spreadsheets

- Upcoming trainings
• Due dates
• Blog post entries

OAP HOMEPAGE

OAP WEB MENUS

The screenshot shows the top navigation bar of the OAP website. It includes the site name 'ISC / UW HR / Faculty & Staff', a search bar 'Search OAP for...', and a 'Quick Links' button. Below the navigation bar, there are four main menu items: 'OAP HOME', 'ABOUT US', 'ACADEMIC HR', and 'EOAA'. The 'ACADEMIC HR' menu is expanded, showing a sub-menu for 'Academic Human Resources'. This sub-menu is organized into four columns: 'ACADEMIC JOBS', 'ACADEMIC TITLES AND RANKS', 'FOR ACADEMIC PERSONNEL', and 'RESOURCES'. The 'RESOURCES' column is further divided into 'RESOURCES' and 'POLICIES AND PROCEDURES'. A 'Feedback' button is visible in the bottom right corner of the menu area.

ISC / UW HR / Faculty & Staff Search OAP for... Quick Links

OAP HOME ABOUT US ACADEMIC HR EOAA

Academic Human Resources

ACADEMIC JOBS

ACADEMIC TITLES AND RANKS

FOR ACADEMIC PERSONNEL

Getting Settled
Time-Off/Leaves
Promotion and Tenure Clock Changes
Academic Responsibilities
Safety in the Workplace
Leaving the UW

RESOURCES

Forms & Templates
COVID-19 Policies and Resources
Due Dates Calendar
Updates & Announcements
eDigest Archive
Upcoming Trainings/Forums
Training & Forum Archive

POLICIES AND PROCEDURES

Recruitment
Compensation Changes
Sabbatical Leave
Provost Guidance on Annual Hiring
Provost's Lecturer Guidelines
Voting Guidelines

APPOINTMENT ACTIONS

Adding/Updating Appointments
Promotion and Tenure
Service Periods
Splitting Tenure

VISAS

Visa Guidance for Unit Administrators
Resources for International Scholars

Feedback

The screenshot shows the 'Visas' menu on the OAP website. The menu is titled 'Visas' and has an upward arrow icon. Below the title, there is a sub-menu item 'Visa Guidance for Unit Administrators'. The main menu items are listed below, separated by horizontal lines:

- Visa Fees
- J-1 Exchange Visitors
- H-1B Temporary Workers
- TN Status for Canadian and Mexican Employees
- E-3 Status for Australian Employees
- Permanent Residence Sponsorship
- B Visitors for Business or Pleasure
- Employing F-1 and J-1 Student Trainees
- Volunteers

Resources for International Scholars

Academic Titles and Ranks

These pages offer specific details for academic titles and ranks at the University of Washington. See the list below for a breakdown of how specific titles and ranks are grouped together for ease of navigation.

Note: Any discrepancies between information found on these titles and ranks pages and existing University policies including those in UW's Policy Directory and the UW Librarian Personnel Code are unintentional. In such cases, the official UW policy document prevails.

Academic Title/Rank Categories

- [Acting Titles](#)
- [Adjunct Appointments](#)
- [Administrative Appointments](#)
- [Affiliate Titles](#)
- [Clinical Titles](#)
- [Librarian Ranks](#)
- [Non-Professorial Instructional and Other Related Titles](#)
- [Postdoctoral Scholar Titles](#)
- [Professorial Tracks](#)
- [Residents and Fellows](#)
- [Visiting Titles](#)
- [Emeritus Appointments and Re-Employed Retirees](#)

For information about Applied Physics Lab (APL) and ROTC ranks, please contact acadpers@uw.edu.

Key Terms

Title, rank, and appointment: These terms are used throughout OAP's titles and ranks pages when referring to the general designation of someone's role at the University. While these terms are often used interchangeably in casual conversation or specifically in other contexts (e.g., Workday), use on OAP's titles and ranks pages is intended to align directly where relevant with how each designation is styled in the UW Faculty Code and the UW Librarian Personnel

Academic HR	↑
Academic Jobs	
Academic Titles and Ranks	
- Acting Titles	
- Adjunct Appointments	
- Administrative Appointments	
- Affiliate Titles	
- Clinical Titles	
- Librarian Ranks	
- Non-Professorial Instructional and Related Titles	
- Postdoctoral Scholar Titles	
- Professorial Tracks	
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- Visiting Titles	
- Emeritus Appointments and Re-Employed Retirees	
For Academic Personnel	
Resources	
Policies and Procedures	
Appointment Actions	

LANDING PAGES

Resources

Looking for information about COVID-19 preparedness at UW? Visit the University of Washington's [Novel Coronavirus Information](#) page.

Forms

- + [New Hire or Appointment Change](#)
- + [Professional](#)
- + [Postdoctoral Scholars](#)
- + [Salary Changes](#)
- + [Visas](#)

Templates

- + [Postdoctoral Scholars](#)
- + [Promotion and Tenure](#)
- + [Recruitment and Hiring](#)
- + [Visas](#)

Users Guides, Checklists, and Other Resources

- + [Recruitment and Hiring](#)
- + [Visas](#)

Academic HR



[Academic Jobs](#)

[Academic Titles and Ranks](#)

[For Academic Personnel](#)

Resources

- [COVID-19 Policies and Resources](#)

- [Due Dates Calendar](#)

- [Postdoctoral Scholar-Paid Direct Appointment Offer Letter Template](#)

- [OAP Updates and Announcements](#)

- [eDigest Archive](#)

- [Upcoming OAP Trainings and Forums](#)

- [Training and Administrators Forum Archive](#)

[Policies and Procedures](#)

[Appointment Actions](#)

[Visas](#)

RESOURCE SECTION

For Academic Personnel

Looking for information about COVID-19 preparedness at UW? Visit the University of Washington's [Novel Coronavirus Information](#) page.

This section provides information for incoming and newly hired individuals as well as current academic personnel employees.

If you have specific questions about working at UW that are not addressed in this section, contact your individual department for additional resources. You can also contact the [Office of Academic Personnel](#).

Forms

+ [Personal Leave](#)

+ [Professional Leave](#)

+ [Visas](#)

Other Resources

+ [New Employee Information](#)

+ [Visa Reference Guides](#)

+ [Promotion and Tenure](#)

Academic Personnel Categories

Academic personnel is defined by [UWAPS 40.1](#). In some cases policies within this section relate to some, but not all categories of academic personnel. Discrete academic personnel categories will be called out when relevant.

Academic HR	↑
Academic Jobs	
Academic Titles and Ranks	
For Academic Personnel	
- Getting Settled	
- Time-Off/Leaves	
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- Academic Responsibilities	
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Visas	

RESOURCES
FOR FACULTY
AND OTHER
ACADEMIC
PERSONNEL

Employer Sexual Misconduct Reference Form

- Form instructions now clarified to state that completed forms be returned to initial requester (not acadpers@uw.edu)
- Updated form: [Sexual Misconduct Reference Checks page](#)

UPDATES

QUESTIONS?

Additional Resources

- [Contact your Academic HR Specialist](#)
- Visit the [OAP Training and Administrators Forum Archive](#)

Q&A

Q: *Does R0025 only include academic personnel job profiles?*

A: You may select any job family when running this report.

Q: *Are merit blackout dates posted yet?*

A: Not yet. Process guide will be posted as soon as merit is approved.

Q: *Do we know when academic personnel salary minimums will be revisited and posted?*

A: September 2023