Spring Cleaning 2024

Academic Data Issues & Business Impacts

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Welcome

Introductions

Objectives

Agenda

Q&A

Introductions

Join the conversation in the poll – your input matters!

- Time in current role
- Time at UW
- Comfort level with HR data for Academic Personnel
- Comfort level with audit reports in Workday

Objectives

1 Identify Workday resources that support operational activities

2 Understanding of how audit reports connect operational activities

3 Best practice recommendations for how to determine when to run reports based on your unit's processes and timelines

Business Processes

Annual Operational Processes

③ Promotions and/or Tenure

⑤ Academic Review

② Reappointments

④ Summer Hiatus

Merit

Ad-hoc or Quarterly Processes

① Hiring/New Appointments

⑥ Terminations/Ending Appointments

Postdoc Compensation Changes

Voting Rosters

Merit

Business Process Basics

What is it?

Annual review process and applicable salary increases when approved

Why does it matter?

UW's process for awarding merit-based salary increases

Who is impacted?

All faculty, educators, and non-SEIU librarians who received salaried compensation at any point during AY2023-24

Dates to Consider

July 31: Data clean-up activities must be completed

August 1: Workday Restricted Entry Period begins

August 1: Data for official merit/unit adjustment files is pulled

August 16: Files are due

When does your unit start working on Merit Reviews?

What is your unit's process for ensuring rehired/reemployed faculty and educators receive merit?

Determining Eligibility

R0536: Merit Data Audit Report

R0536 Report Inclusion Criteria

Active position as of the merit snapshot date (August 31)

Not on leave

Not in the Unpaid Academic job profile

Active General Salary Plan as of the merit snapshot date (August 31)

No future dated termination actions

In a merit-eligible job profile

Monthly Base Rate or Practice Plan Allocation > $0

Active academic appointment as of the merit snapshot date (August 31)

Position in the 01-Academic Personnel job family group

R0536 Report Inclusion Criteria

Active position as of the merit snapshot date (August 31)

Not on leave

Not in the Unpaid Academic job profile

Active General Salary Plan as of the merit snapshot date (August 31)

No future dated termination actions

In a merit-eligible job profile

Monthly Base Rate or Practice Plan Allocation > $0

Active academic appointment as of the merit snapshot date (August 31)

Position in the 01-Academic Personnel job family group

Data Needed for the Process

✓ Output from R0536: Merit Data Audit Report

Additional data as determined at the unit level

Related Audit Reports

R0321: Upcoming End Employment Dates

R0612: Academic Appointees without Active Positions

R0663: Invalid Academic Position End Dates

Audit Reports in Context

Report	Reappointments	P&T	Academic Review	Summer Hiatus	Merit
R0321: Upcoming End Employment Dates	✔			✔	✔
R0612: Academic Appointees without Active Positions	✔	✔	✔	✔	✔
R0623: Academic Positions with Invalid Service Periods				✔	✔

Questions?

Postdoc Compensation
Changes

Business Process Basics

What is it?

Many postdocs are eligible for pay increases on their postdoc anniversary date

Why does it matter?

It is a requirement of the UAW Postdocs collective bargaining agreement

Who is impacted?

Postdoctoral Scholars who were paid more than $5,459 (the previous minimum) on Dec 31 2023.

Dates to Consider

Postdoc Anniversary Date

Postdoc appointment end date

When does your unit start working on each postdoc's reappointment?

Do your postdocs' anniversary dates align with their reappointment dates?

Determining Eligibility

Eligibility is based on the postdoc's anniversary date and base rate as of Dec 31, 2023

○ If the base rate on Dec 31, 2023 was between $5,459 and $5,593, no additional increases are required in 2024

○ If the base rate on Dec 31 2023 was greater than $5,593, an increase is required on their anniversary date in 2024

Please see email communications from OAP from earlier this year with specific instructions

Postdoc Compensation Data Issues

Missing academic appointment

No postdoc anniversary date

Invalid compensation plan end date

Missing position end date

Invalid position end date

Missing academic appointment end date

No compensation grade profile

Postdoc anniversary date that precedes UW postdoc start date

Postdoc Compensation Data Issues

Missing academic appointment

No postdoc anniversary date

Invalid compensation plan end date

Missing position end date

Invalid position end date

Missing academic appointment end date

No compensation grade profile

Postdoc anniversary date that precedes UW postdoc start date

Related Audit Reports

R0702: Missing Postdoc Anniversary Dates

Bonus

R0469: Academic Workers without Primary Appointments

Questions?

Voting Rosters

Business Process Basics

What is it?

Lists of faculty eligible to vote on various actions such as faculty senate legislation, promotions, and new appointments

Why does it matter?

The Faculty Code defines voting eligibility and rights

Who is impacted?

All faculty

Dates to Consider

Timelines for other processes discussed in this presentation

When does your unit vote on various actions?

Are there pending votes on Faculty Senate legislation faculty in your unit are passionate about?

Determining Eligibility

R0237 Voting Faculty

◦ Faculty on leave are included in the report output, units should determine whether they are eligible to vote

AHR [Voting Guidelines](#)

R0237 Report Inclusion Criteria

Active position as of prompt date

Primary appointment in a voting eligible academic rank

Academic appointment end date entered

Employee Type

Roster value

Returned from completed leave

Primary rank is valid for job profile

On sabbatical

Total FTE

R0237 Report Inclusion Criteria

Active position as of prompt date

Academic appointment end date entered

Primary appointment in a voting eligible academic rank

Roster value

Employee Type

Returned from completed leave

Primary rank is valid for job profile

On sabbatical

Total FTE

Related Audit Reports

R0707: Academic FTE/Roster Percent/Tenure Value Audit

R0343: Appointments with Invalid Appointment Identifiers

R0469: Academic Workers without Primary Academic Appointments

R0612: Academic Appointees without Active Positions

R0650: Academic Personnel with an Invalid Primary Academic Rank

Questions?

Action Items

Objectives

1   Identify Workday resources that support operational activities

2   Understanding of how audit reports connect operational activities

3   Best practice recommendations for how to determine when to run reports based on your unit's processes and timelines

Setting Your Own Priorities

Which process/issues are the highest priority for your unit?

- Most common data issue
- Most time-consuming process
- Most visible process
- Biggest pain point

Incorporating Audits into Regular Work

What are the workflows in your unit?

- ◦ Where can you add a review to ensure complete & correct data entry?
- ◦ Where can you add audit reports into the flow?
- ◦ How much time do you need to address issues identified by audits?
- ◦ What other processes and activities do you need to accommodate?

Questions?

Thank you!!!

Report	Reappointments	P&T	Academic Review	Summer Hiatus	Merit
R0321: Upcoming End Employment Dates	✔			✔	✔
R0343: Appointments with Invalid Appointment Identifiers		✔	✔		
R0361: Expired & Expiring Academic Appointments	✔	✔	✔		
R0469: Academic Workers without Primary Academic Appointments	✔	✔	✔		
R0612: Academic Appointees without Active Positions	✔	✔	✔	✔	✔
R0623: Academic Positions with Invalid Service Periods				✔	✔
R0630: Invalid Appointment End Date Audit	✔	✔	✔		
R0650: Academic Personnel with an Invalid Primary Academic Rank	✔	✔	✔		
R0658: Appointments Missing Academic Review Dates			✔		
R0663: Invalid Academic Position End Dates	✔	✔		✔	
R0686: Waiver Year Actions without Waiver Year Entries		✔			
R0689: Academic Personnel Missing Education History Entries		✔			
R0707: Academic FTE/Roster Percent/Tenure Value Audit		✔			
R0721: Secondary Appointments with Invalid Ranks	✔	✔			

Report	Hires/ New Appointments	Terminations /Ending Academic Appointments	Postdoc Compensation Changes	Voting Rosters
R0321: Upcoming End Employment Dates		✔		
R0343: Appointments with Invalid Appointment Identifiers				✔
R0361: Expired & Expiring Academic Appointments		✔		
R0469: Academic Workers without Primary Academic Appointments	✔		✔	✔
R0612: Academic Appointees without Active Positions	✔			✔
R0630: Invalid Appointment End Date Audit		✔		
R0650: Academic Personnel with an Invalid Primary Academic Rank	✔			✔
R0659: Academic Salaries Below UW Minimum	✔			
R0663: Invalid Academic Position End Dates		✔		
R0702: Missing Postdoc Anniversary Dates			✔	
R0707: Academic FTE/Roster Percent/Tenure Value Audit				✔