Spring Cleaning 2024

Academic Data Issues & Business Impacts

May 15, 2024
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)
- Active academic appointment as of the merit snapshot date (August 31)
- Not on leave
- No future dated termination actions
- Monthly Base Rate or Practice Plan Allocation > $0
- Not in the Unpaid Academic job profile
- Active General Salary Plan as of the merit snapshot date (August 31)
- In a merit-eligible job profile
- Position in the 01-Academic Personnel job family group
R0536 Report Inclusion Criteria

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

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<th>Report</th>
<th>Reappointments</th>
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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
- Missing position end date
- No compensation grade profile
- No postdoc anniversary date
- Invalid compensation plan end date
- Invalid position end date
- Missing academic appointment end date
- 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
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- Missing academic appointment end date
- Missing position 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
- Roster value
- Academic appointment end date entered
- Total FTE
- Returned from completed leave
- On sabbatical
- Employee Type
  - Primary appointment in a voting eligible academic rank
  - Primary rank is valid for job profile
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?
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