

UWFT Cutover Preparations

Strategies for Addressing Academic Personnel
Data Issues



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OFFICE OF ACADEMIC PERSONNEL
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Agenda

- Objectives
- General Reminders
- Issues and Impacted Personnel

Objectives

1. Support your efforts to prepare for the UWFT Cutover
2. Minimize the need for post-cutover rescinds of pre-7/2 transactions
3. Improve overall data quality in Workday

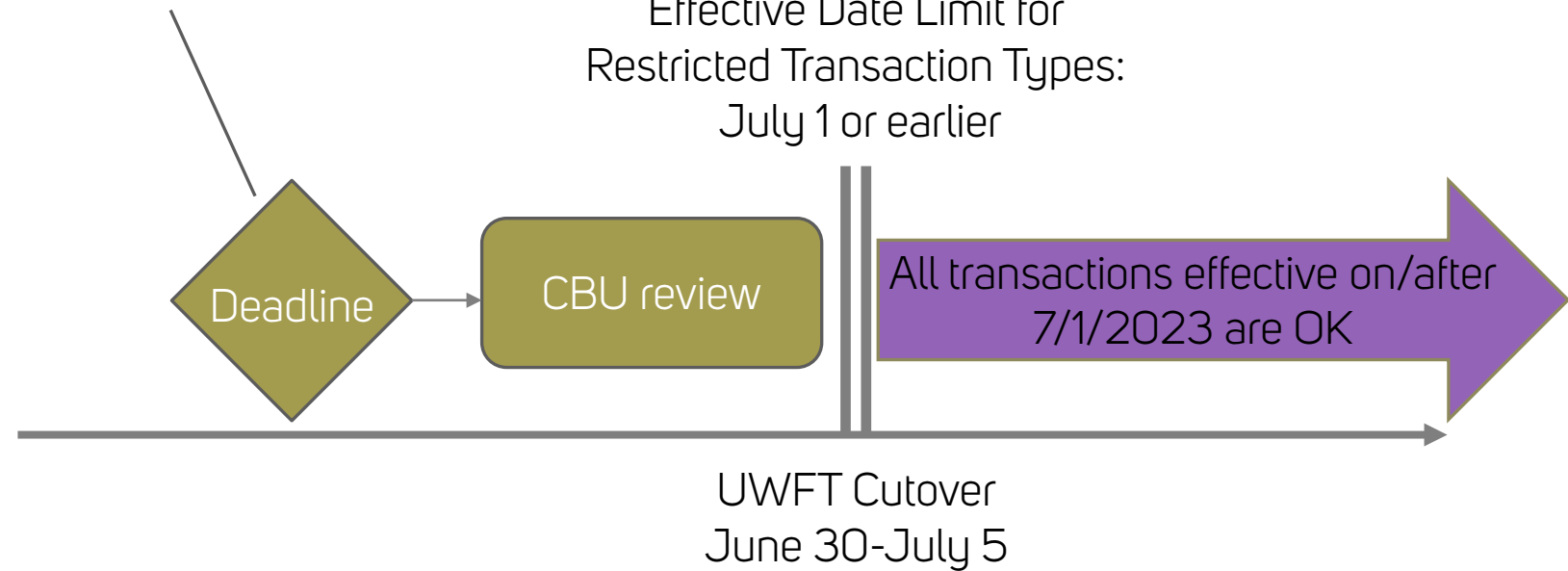
General Reminders

Other Resources

- All of the following is based on our current understanding of the cutover and may change at any time
- Please see the [ISC](#) and [UWFT](#) cutover web pages for the most up to date information

Timeline

OAP: June 16
ISC: June 25



BPs restricted for effective dates 7/2 and later during Restricted Entry Period

- Add Additional Job
- Change Job (except *Data Change* actions such as FTE changes)
- Change Organization Assignments for Worker
- Contract Contingent Worker (*only applicable for academic personnel in School of Medicine*)
- End Additional Job
- End Contingent Worker Contract (*only applicable for academic personnel in School of Medicine*)
- Hire
- Termination

Board of Regents Appointments

- [Interim process](#) for new hires/rehires
 - Hire dates between 7/2/2023 to 9/16/2023
- Existing UW employees
 - Enter the academic appointment now
 - Enter the job change based on the start date

Plan Ahead for July 1-15 Pay Period

- UWFT Go Live is scheduled for July 6
 - 12 Month Promotions will be effective July 1
 - Bargaining unit changes, including comp changes, go into effect on July 1
 - Costing allocation steps will be added as a sub-process to many current business processes
- ❖ ***Plan for transactions and approvals to take more time than usual***

Merit Restricted Entry Periods

- Restricted Entry Period 1: *Now through July 31*
 - Primarily impacts transactions with effective dates on or after 9/1
- Restricted Entry Period 2: *August 1 to September 15*
 - Impacts all included transaction types regardless of effective date

Office Hours

Schedule:

- Wednesdays, 9:00am
 - May 3 to June 14
- Thursdays, 3:00pm
 - June 1 to 15
- <https://washington.zoom.us/j/97473758501?pwd=bnFxOGNmUlJ0OEh3cGNBVTBxZlU4Zz09>

Issues & Impacted Personnel

Presentation Plan

- Issue Type/Reason Codes
- Underlying causes
- Reports to identify potentially impacted personnel
- Courses of action to resolve issue(s)

Change Job

- Lateral Move
- Transfer
- Promotion

➤ *Data Change actions not impacted*

Job Change is Required - Causes

Previous lateral
move into incorrect
job profile

Multiple step
BP process not
completed

Planned sup
org change

Fall outs not
resolved

Incomplete
information sharing
between or within
academic units

Post-degree
conferral job change
not completed

Invalid
employee
type

Planned
job change

Job Change is Required - Causes

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Invalid
employee
type

Planned
job change

Take Action: Employee Type

Possible Scenarios

- Incorrect employee type selected when creating the position
- Employee type not changed following promotion
- Employee type not changed following change in compensation structure

R0709 Academic Personnel with an Invalid Employee Type

- Create new position with correct employee type, then move the worker into new position

Job Change is Required - Causes

Previous lateral
move into incorrect
job profile

Multiple step
BP process not
completed

Planned sup
org change

Fall outs not
resolved

Incomplete
information sharing
between or within
academic units

Post-degree
conferral job change
not completed

Invalid
employee
type

Planned
job change

Take Action: Rank/Profile Discrepancies

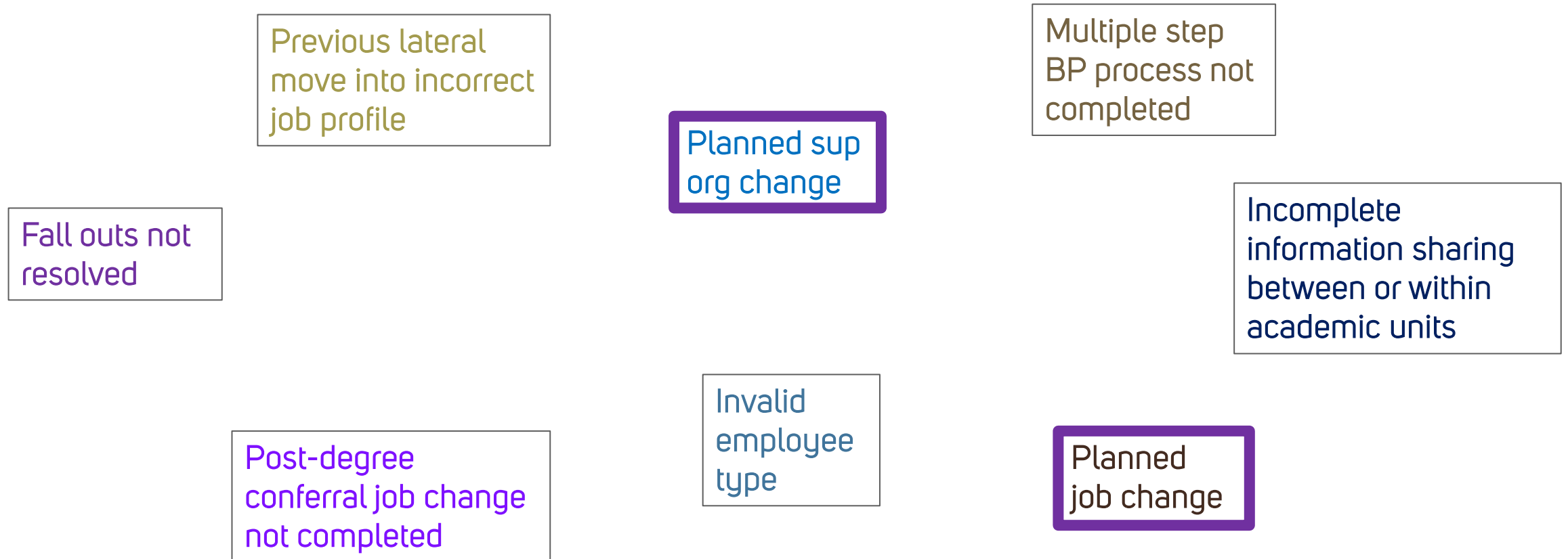
Possible Scenarios

- Fall out from promotion EIB
- “Salaried” job profile selected when moving from unpaid to paid status
- Job change not completed after award of PhD (Postdoctoral Scholar or Acting Assistant Professor pending PhD)

R0650 Academic Personnel with an Invalid Primary Academic Rank

- [Promote](#) to correct job profile
- [Job Change](#) to correct job profile
- Resolve [appointment](#) issue

Job Change is Required - Causes



Take Action: Planned Changes

- Effective Date on or before 7/1/2023
 - Enter change in Workday prior to UWFT Cutover deadlines
- Effective Date between 7/2/2023 and 8/31/2023*
 - Enter change in Workday between 7/6/2023 and 7/31/2023
- Effective Date on or after 9/1/2023*
 - Enter change in Workday after Merit Restricted Entry Period 2 ends (currently scheduled for 9/15/2023)

* ***Enter the academic appointment now***

Additional circumstances requiring job change



- FTE changes
 - *FTE changes are not restricted during the UWFT Cutover Restricted Entry Period*
- Lateral moves to/from paid status
 - *Lateral moves are restricted during the UWFT Cutover Restricted Entry Period – people requiring lateral moves may be identified using R0650 Academic Personnel with an Invalid Primary Academic Rank; planned moves should be entered based on the effective date as described on the previous slide*
- Student/ASE job changes
 - *OAP does not have any reports to identify students or ASEs requiring job changes; planned moves should be entered based on the effective date as described on the previous slide*

Termination/ End Additional Job

- Separation
- Retirement
- Death

➤ *End Contingent Worker Contract is only valid for academic personnel in School of Medicine*

Termination/End Additional Job is Required - Causes

Expired positions
not ended

Fall outs not
resolved

Planned
termination

Incomplete
information sharing
between or within
academic units

Emeritus faculty
who should no
longer be active

Multiple step
BP process not
completed

Other required BPs
not completed

Pending
emeritus
appointment

Termination/End Additional Job is Required - Causes

Expired positions
not ended

Fall outs not
resolved

Planned
termination

Emeritus faculty
who should no
longer be active

Incomplete
information sharing
between or within
academic units

Multiple step
BP process not
completed

Other required BPs
not completed

Pending
emeritus
appointment

Take Action: Active Position Without Academic Appointment

Possible Scenarios

- End academic appointment completed, Termination BP in progress or not initiated
- Fall out from reappointment
- Primary appointment ended, secondary appointment still active

R0469 Academic Workers without Primary Academic Appointments

- [Terminate](#) worker
- [Add](#) new academic appointment
- [Update](#) existing academic appointment

Termination/End Additional Job is Required - Causes

Expired positions
not ended

Fall outs not
resolved

Planned
termination

Incomplete
information sharing
between or within
academic units

Emeritus faculty
who should no
longer be active

Multiple step
BP process not
completed

Other required BPs
not completed

Pending
emeritus
appointment

Take Action: Expired Position

Possible Scenarios

- Fixed Term Job Ended
- Position reappointment not completed
- Lateral move from Paid to unpaid not completed

R0663 Invalid Academic Position End Dates
R0321 Upcoming End Employment Dates

- [Terminate worker](#)
- [Extend position end date](#)
- [Lateral Move into Unpaid Academic](#) job profile

Termination/End Additional Job is Required - Causes

Expired positions
not ended

Fall outs not
resolved

Planned
termination

Incomplete
information sharing
between or within
academic units

Emeritus faculty
who should no
longer be active

Multiple step
BP process not
completed

Other required BPs
not completed

Pending
emeritus
appointment

Take Action: Emeritus Faculty

Possible Scenarios

- Emeritus faculty resigns appointment
- Emeritus faculty passes away

No available report

- [Terminate worker](#)
- [End academic appointment](#)

Termination/End Additional Job is Required - Causes

Expired positions
not ended

Fall outs not
resolved

Planned
termination

Incomplete
information sharing
between or within
academic units

Emeritus faculty
who should no
longer be active

Multiple step
BP process not
completed

Other required BPs
not completed

Pending
emeritus
appointment

Take Action: Planned Termination

- Effective Date on or before 7/1/2023
 - Enter action in Workday prior to UWFT Cutover deadlines
- Effective Date on or after 7/2/2023
 - Enter action in Workday after cutover is completed (7/6/2023)

Additional circumstances requiring termination or end additional job



- End of fixed term appointment
 - *Terminations are restricted during the UWFT Cutover Restricted Entry Period – people with fixed term appointments that must be ended may be identified using R0663 Invalid Academic Position End Dates or R0321 Upcoming End Employment Dates; planned terminations should be entered based on the effective date as described on the previous slide*

Hire/ Add Additional Job

- New Employee
- Rehire Former Employee
- Hire Unpaid Academic
- Add Additional Job

➤ ***Contract Contingent Worker is only valid for Academic Personnel in School of Medicine***

Hire/Add Additional Job is Required - Causes

Change in
compensation
structure

Multiple step
BP process not
completed

Worker
incorrectly
terminated

Last minute need for
Summer instructional
coverage

Pending
emeritus
appointment

Incomplete
information sharing
between or within
academic units

Planned Summer
quarter hiring

Hire/Add Additional Job is Required - Causes

Change in
compensation
structure

Multiple step
BP process not
completed

Worker
incorrectly
terminated

Last minute need for
Summer instructional
coverage

Pending
emeritus
appointment

Incomplete
information sharing
between or within
academic units

Planned Summer
quarter hiring

Take Action: Rehire Needed

Possible Scenarios

- Primary appointment ended and worker terminated, secondary appointment still active
- Paid appointment ended and worker terminated, courtesy appointment still active
- Terminated at the end of period of paid status instead of moved into Unpaid academic

R0612 Academic Appointees without Active Positions

- [Rehire](#) into new position
- [End the academic appointment](#) (can not have been reappointed for AY2023-24)

Hire/Add Additional Job is Required - Causes

Change in
compensation
structure

Multiple step
BP process not
completed

Worker
incorrectly
terminated

Last minute need for
Summer instructional
coverage

Pending
emeritus
appointment

Incomplete
information sharing
between or within
academic units

Planned Summer
quarter hiring

Take Action: Planned Hire/ Rehire

- Effective Date on or before 7/1/2023
 - Enter change in Workday prior to UWFT Cutover deadlines
- Effective Date on or after 7/2/2023
 - Enter change in Workday after cutover is completed (7/6/2023)
 - Use the [interim process](#) for appointments requiring Board of Regents' approval

Additional circumstances requiring hire or add additional job



- Summer quarter hiring (specifically study abroad)
 - *Planned hires should be entered based on the effective date as described on the previous slide*
- Last minute summer and fall schedules and planning for hiatus
 - *Planned hires should be entered based on the effective date as described on the previous slide*

Change Organizational Assignments

Change Organizational Assignment is Required - Causes

Incomplete information
sharing between or
within academic units

Multiple step BP
process not
completed

Campus Mailbox
change

Service Period
change

Cost center
change

Project Task or
Option change

Change Organizational Assignment is Required - Causes

Incomplete information
sharing between or
within academic units

Multiple step BP
process not
completed

Campus Mailbox
change

Service Period
change

Cost center
change

Project Task or
Option change

Take Action: Invalid Service Period

Possible Scenarios

- Changed jobs to a job profile with a different service period
- Changed jobs to a unit with a different service period
- Service period entered incorrectly initially

R0623 Academic Positions with Invalid Service Periods

- ["Change Organizational Assignment"](#) to correct service period
- Determine if additional changes are needed:
 - R0708.1 Invalid Compensation Grade Profile for Academic Personnel
 - R0659 Academic Salaries Below the UW Minimum

Change Organizational Assignment is Required - Causes

Incomplete information
sharing between or
within academic units

Multiple step BP
process not
completed

Campus Mailbox
change

Service Period
change

Cost center
change

Project Task or
Option change

Take Action: Planned Changes

- Effective Date on or before 7/1/2023
 - Enter action in Workday prior to UWFT Cutover deadlines
- Effective Date on or after 7/2/2023
 - Enter action in Workday after cutover is completed (7/6/2023)

Additional circumstances requiring a change organizational assignment



- Which process should be used to change supervisory organization assignments?
 - *Supervisory organization changes are achieved through a job change, please see the report recommendations and timeframes for planned changes in the Job Change section above.*