UWFT Cutover Preparations

Strategies for Addressing Academic Personnel Data Issues
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

Pre-cutover Transaction Effective Date Limit for Restricted Transaction Types:
July 1 or earlier

OAP: June 16
ISC: June 25

Deadline
CBU review

All transactions effective on/after 7/1/2023 are OK

UWFT Cutover
June 30-July 5
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
• **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=bnFxOGNmUlJ0OEt3cGNBVTBxZIU4Zz09
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
- Fall outs not resolved
- Post-degree conferral job change not completed
- Planned sup org change
- Invalid employee type
- Multiple step BP process not completed
- Incomplete information sharing between or within academic units
- Planned job change
Job Change is Required - Causes

- Previous lateral move into incorrect job profile
- Fall outs not resolved
- Post-degree conferral job change not completed
- Planned sup org change
- Invalid employee type
- Planned job change
- Multiple step BP process not completed
- Incomplete information sharing between or within academic units
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
- Fall outs not resolved
- Post-degree conferral job change not completed
- Planned sup org change
- Multiple step BP process not completed
- Incomplete information sharing between or within academic units
- 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

- Previous lateral move into incorrect job profile
- Fall outs not resolved
- Post-degree conferral job change not completed
- Planned sup org change
- Planned job change
- Invalid employee type
- Multiple step BP process not completed
- Incomplete information sharing between or within academic units
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
- Emeritus faculty who should no longer be active
- Planned termination
- Incomplete information sharing between or within academic units
- Other required BPs not completed
- Pending emeritus appointment
- Multiple step BP process not completed
Termination/End Additional Job is Required - Causes

- Expired positions not ended
- Fall outs not resolved
- Emeritus faculty who should no longer be active
- Incomplete information sharing between or within academic units
- Other required BPs not completed
- Planned termination
- Pending emeritus appointment
- Multiple step BP process not completed
- Pending termination
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
- Emeritus faculty who should no longer be active
- Incomplete information sharing between or within academic units
- Other required BPs not completed
- Pending emeritus appointment
- Multiple step BP process not completed
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
- Multiple step BP process not completed
- Pending emeritus appointment
- Incomplete information sharing between or within academic units
- Emeritus faculty who should no longer be active
- Other required BPs not completed
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
- Emeritus faculty who should no longer be active
- Pending emeritus appointment
- Multiple step BP process not completed
- Incomplete information sharing between or within academic units
- Other required BPs not completed
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.
• 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
- Last minute need for Summer instructional coverage
- Incomplete information sharing between or within academic units
- Multiple step BP process not completed
- Worker incorrectly terminated
- Pending emeritus appointment
- Planned Summer quarter hiring
Hire/Add Additional Job is Required - Causes

- Change in compensation structure
- Last minute need for Summer instructional coverage
- Incomplete information sharing between or within academic units
- Multiple step BP process not completed
- Worker incorrectly terminated
- Pending emeritus appointment
- 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
- Pending emeritus appointment
- Planned Summer quarter hiring
- Incomplete information sharing between or within academic units
- Last minute need for Summer instructional coverage
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
- Service Period change
- Campus Mailbox change
- Cost center change
- Project Task or Option change
Change Organizational Assignment is Required - Causes

- Incomplete information sharing between or within academic units
- Service Period change
- Campus Mailbox change
- Cost center change
- Multiple step BP process not completed
- 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)
• 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.