SPRING CLEANING 2021

Workday Position Data Entry for Academic Personnel

AGENDA

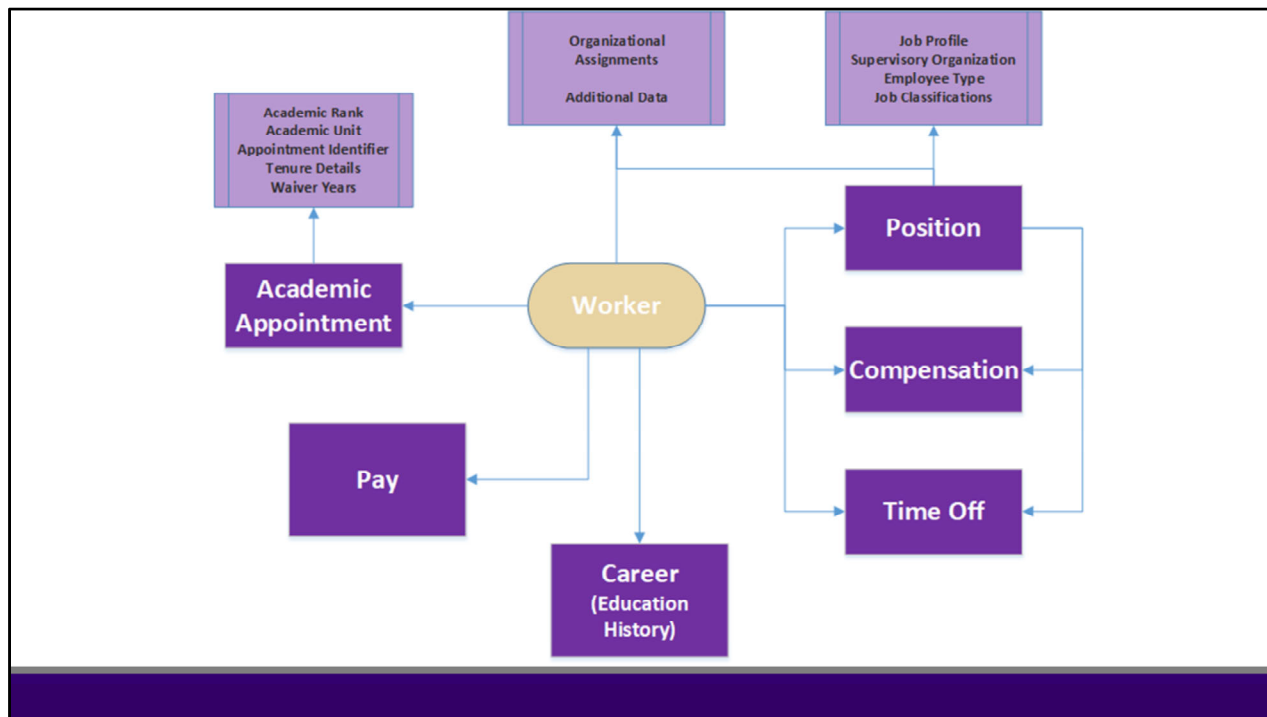Overview of Workday Data Structures

Career

Position Linked Objects

Position & Job Fields

Organizational Assignments & Additional Data

WORKDAY DATA STRUCTURES

Academic Appointment data was covered in detail as part of Spring Cleaning 2020 – slide decks are available:
https://ap.washington.edu/wp-content/uploads/Week-3-Academic-Appointment-Data-in-Detail-including-QA-revised-Read-Only.pdf
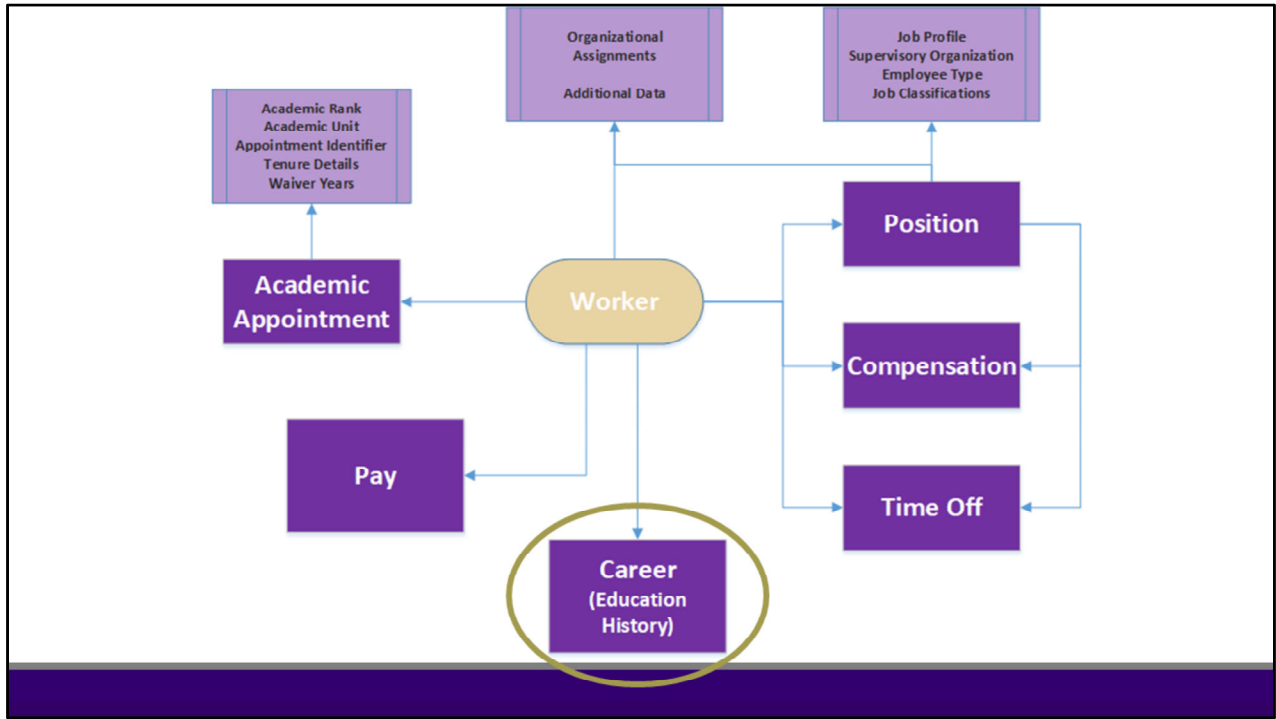https://ap.washington.edu/wp-content/uploads/Week-2-Dates-for-Academic-Appointments-including-QA.pdf
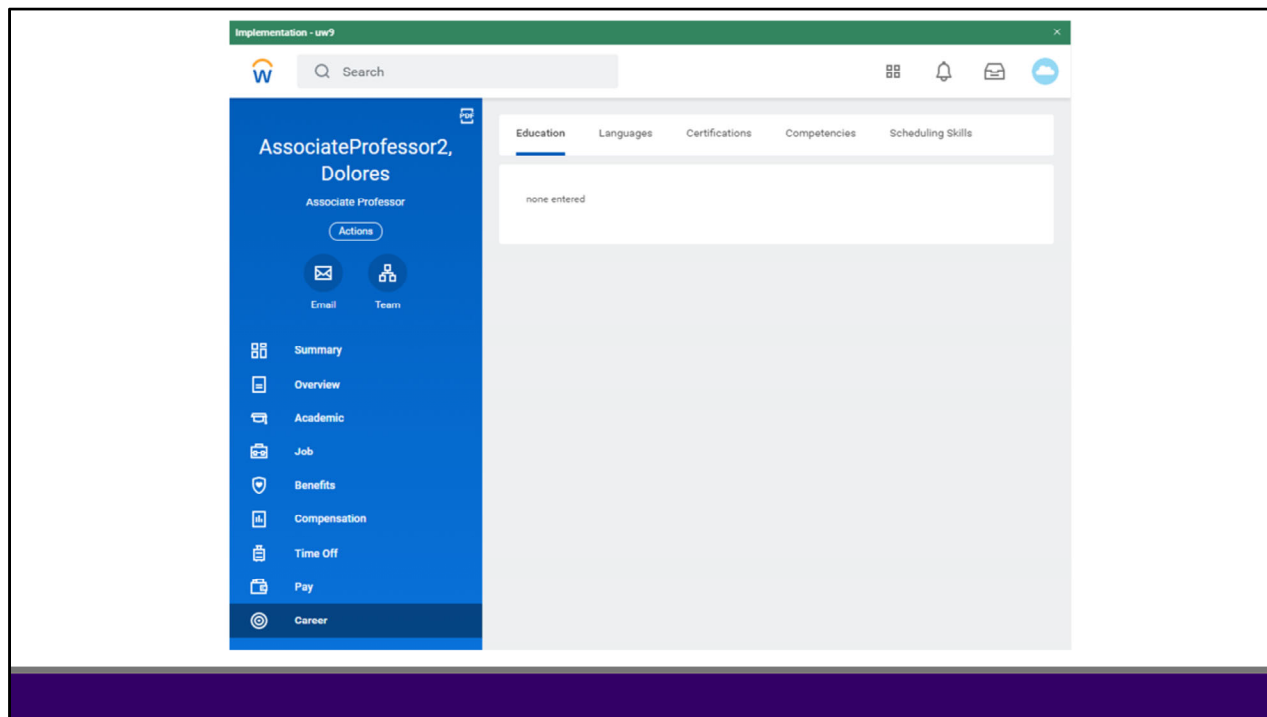https://ap.washington.edu/wp-content/uploads/Data-for-UW-Academic-Personnel-in-Workday-including-QA.pdf

Pay contains details of costing allocations, which are outside OAP's scope, so it will not be covered in this session.

QUESTIONS?
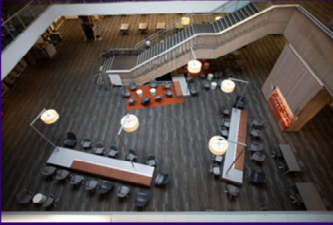
CAREER

Education is required for Academic Personnel at UW

Languages can be entered for any worker at UW, but isn't used by the Office of Academic Personnel

Certifications is only used by Medical Centers

Competencies and Scheduling Skills are also not used by the Office of Academic Personnel

Degree options are: Medical Doctorate (MD); Doctorate (PhD); Masters (MS, MA, MBA, etc.); Bachelors (BA, BS, BAAS, etc.); Juris Doctor (JD)

Email the ISC if the school is not available in the dropdown.

Do not enter first year attended or grade average.

Process to add Education History is in the ISC User Guides: https://isc.uw.edu/user-guides/manage_education_academic_personnel/

QUESTIONS?
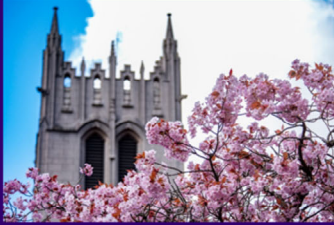
Q: Can other terminal degrees be added in Workday?

A: *Possibly, we'll work with the campus partners involved in identifying the degree levels to see if we can make an addition to accommodate degrees such as DDS, and PsyD*

Q: Is there a report to run to see who is missing education information?

A: *Yes! R0689: Academic Personnel Missing Education History. This report should be run ahead of each promotion and tenure (P&T) cycle. Education information is an important piece of the P&T records review.*

Q: Are academic personnel able to add their own education history?

A: *No, that will need to be done by someone who holds an administrative security role, such as Academic Partner or HCM Initiate 1, in Workday .*

POSITION LINKED OBJECTS
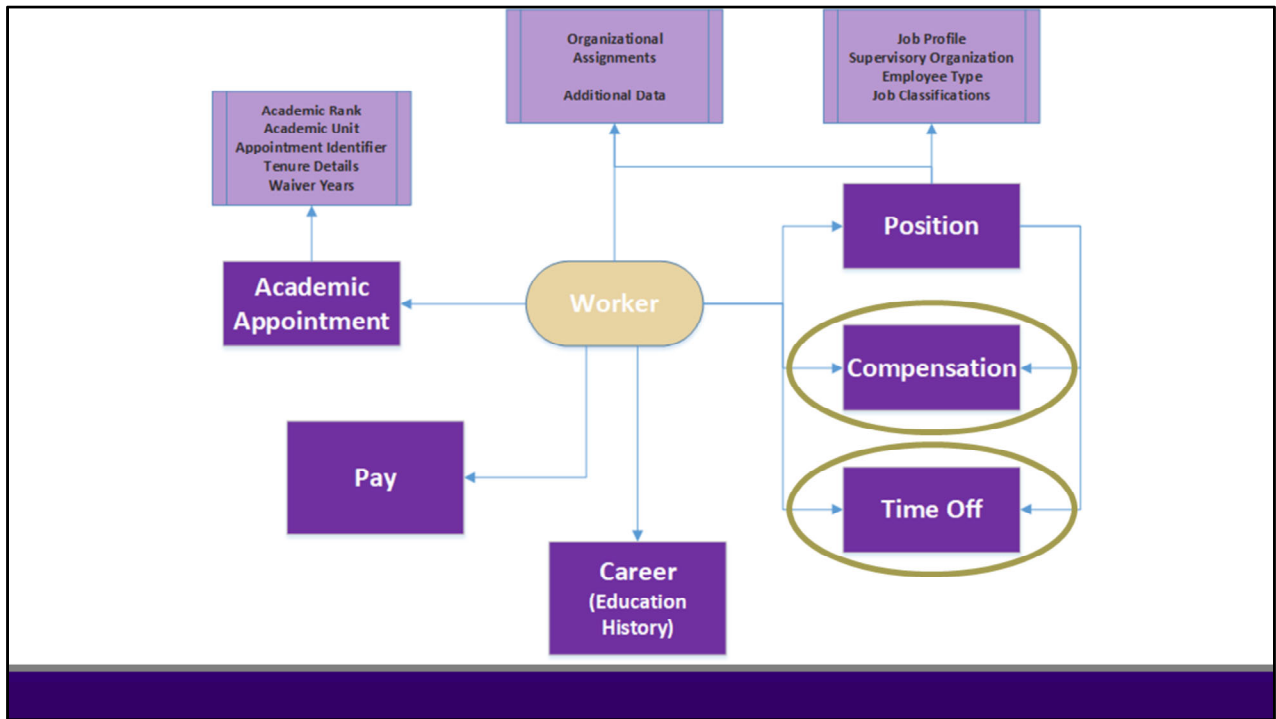
WORKDAY OBJECTS RELATED TO POSITIONS

COMPENSATION (COMP)

- Each position has one or more compensation plan assignments
- Comp plan assignments for additional positions can be different from the primary position

LEAVES

- Leave accruals are proportional to position FTE
- Leaves taken/time offs are tracked separately for each position

Totals reflect FTE adjusted values
Compensation describes the compensation package, grade, and pay range
Plan assignments are specific to the worker and position

Example of a worker with two positions, each with a different compensation structure.
Only the compensation plans associated with the position being viewed are displayed.
Primary position:
- General salary plan
- UWP Practice Plan allowance

Example of a worker with two positions, each with a different compensation structure. Only the compensation plans associated with the position being viewed are displayed.

Additional position:
- PDR salary plan only

Additional positions are expected when a person has multiple salary plans

Time Off includes details of balances and times off taken

Example of a worker with two positions, each with a different leave accrual structure. Both leave accrual schedules show on the Time Off Balance tab regardless of which position is selected.

Leave accrual plans are based on the job profile, and a different between faculty, librarians, academic staff, academic personnel represented by collective bargaining agreements, professional staff, classified staff, and student employees.

QUESTIONS?

POSITION FIELDS
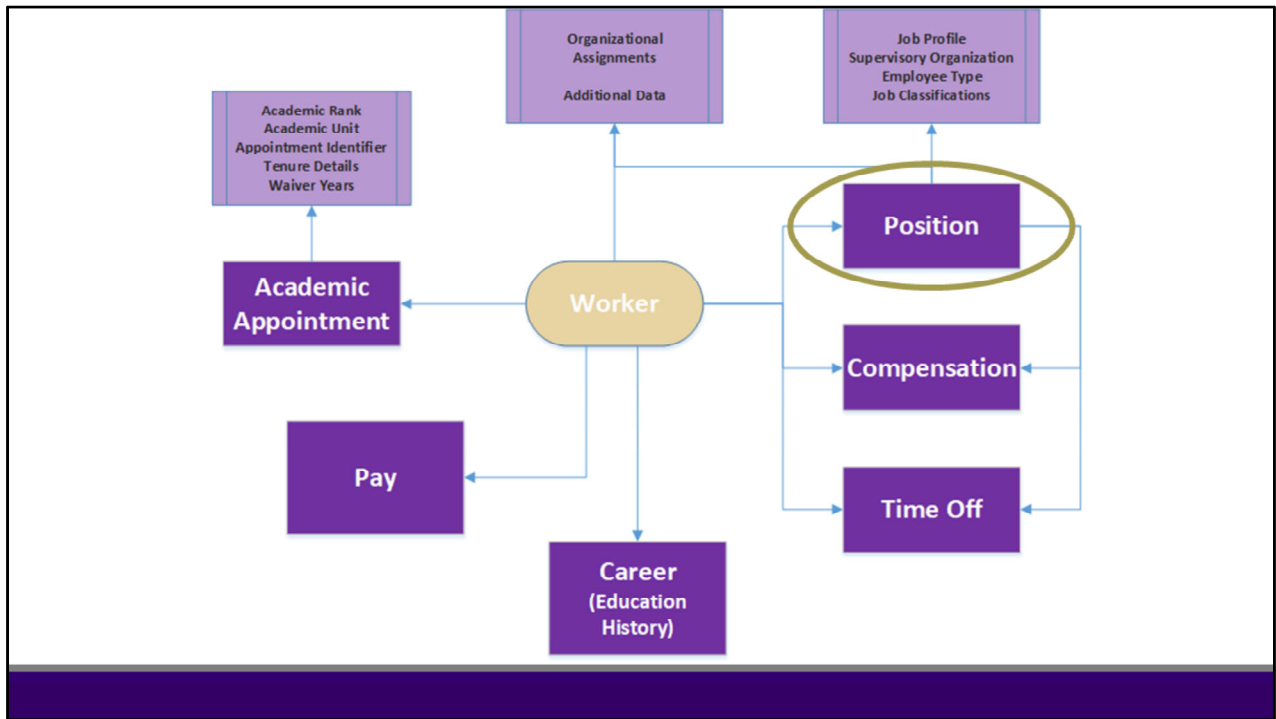
FIELDS ON THE POSITION

Job Profile	✕ Associate Professor ··· ☰
Job Description Summary	Associate Professor
Job Description	Format ∨ B I U A ∨ ☰ 🔗
Location	✕ Seattle Campus ··· ☰
Time Type	✕ Full time ☰
Worker Type	✕ Employee ☰
Worker Sub-Type	✕ Regular ☰

Supervisory Orgs can be Position Management or Job Management – job profiles that are JM need to be in JM sup orgs (

JOB PROFILE

Job Profile — ☒ Associate Professor ⋯

- Describes primary job function
- Based on titles and ranks/tracks described in the governing documents
- Details conditions of employment
  - compensation type
  - union membership
  - overtime eligibility
- Organized into job families and job family groups
  - Professorial Faculty
    - 01 - Academic Personnel - Faculty - Indefinite and Multi-Year
  - Librarians
    - 01 - Academic Personnel – Librarian
  - Postdocs
    - 01 - Academic Personnel - Faculty - Indefinite and Multi-Year
    - 01 - Academic Personnel - Postdoctoral Scholar
    - 02 - Union/Bargaining Unit - UAW - Postdoctoral Scholar

Governing documents include: Faculty Code, Librarian Personnel Code, and collective bargaining agreements
5 postdoc job profiles, 1 academic rank
6 extension lecturer job profiles, 1 academic rank
2 job profiles for each non-temporary or provisional librarian academic rank

A position may include several job profiles when created (i.e. if the title is promotable), but one must be selected when hiring someone into a position

LOCATION

Location   × Seattle Campus ⋯   ☰

- Seattle Campus
- Bothell Campus
- Tacoma Campus
- Remote Locations
- International Locations

** International Locations need OAP approval

TIME TYPE

- Full-Time – 40 hours per week
- Part-Time – less than 40 hours per week

Time Type   × Full time

For reporting purposes, any title that includes the phrase "Part-Time" is categorized as part-time regardless of scheduled hours

WORKER TYPE

Worker Type | ✕ Employee | ☰

- **Employee**
  - Use for all academic personnel

- **Contingent Worker**
  - Do not use for academic personnel

Valid options for academic personnel are:
- Fixed Term (Fixed Term)
- Fixed Term PDR (Fixed Term)
- Fixed Term Practice Plan (Fixed Term)
- Regular
- Regular PDR
- Regular Practice Plan
- Unpaid Academic

QUESTIONS?

Q: Is FTE attached to the Position or Academic Appointment?

A: *FTE is a position value. Roster percent is attached to the academic appointment. Roster percent is the Workday term for the percent an individual was contracted to work. It signifies the maximum FTE allowed in a given position. This is called "appointment percent" on OAP web content outside of Workday references. FTE refers to paid effort or what a person is actually working.*

POSITION OR JOB?

Position	+	Worker	=	Job

- Positions can exist without a worker
- Workers must have a position
- Job details are specific to a worker – if a different worker is assigned the same position, the job values may be different

FIELDS ON THE JOB

Values appear in different orders/sections when adding versus editing

Values auto populate from position

When position includes multiple job profiles, make sure Job Profile and Employee Type values correspond

If Scheduled Weekly Hours are less than 40, also change the Time Type

If position includes assistant professor, associate professor, and professor job profiles, make sure the selected value for employee type is valid for the job profile
- Employee Type determines whether the End Employment Date field is made available

If the worker will not be full-time, both the time type and scheduled weekly hours need to be changed

ADDITIONAL DETAILS

Values auto populate from position
Job Title should not be changed
Business Title and Default Weekly Hours can be changed
- Business Title appears in the Campus Directory

ADDITIONAL DETAILS (CONTINUED)

Additional Job Classifications	
Company Insider Types	
Workers' Compensation Code from Job Profile	4906 - PUBLIC INSTIT - HIGHER LRNG (United States of America)
Workers' Compensation Code Override	
Work Shift	
First Day of Work	04/01/2021
End Employment Date	
Exclude from Headcount	☐

Details in following slides

ADDITIONAL JOB CLASSIFICATIONS

Job Classifications

Additional Job Classifications
(empty)

- PDR Affiliation Source
- Practice Plan Affiliation Source
- Security/Safety Sensitive for JM Academics
- Essential Position for JM Academics

These are optional and should only be added if relevant.

If a dean's/chancellor's office wants to be able to report on these data, entry should be required at the local level

COMPANY INSIDER TYPES

Company Insider Types [_____] ☰

- Not required for UW academic personnel

WORKER' COMPENSATION CODE

Workers' Compensation Code from Job Profile	4906 - PUBLIC INSTIT - HIGHER LRNG (United
Workers' Compensation Code Override	☰

- Do not add an override value without specific instructions from a central office

WORK SHIFT

Work Shift *
First Shift (United States of America)   added

- All academic personnel are "First Shift" regardless of work schedule.

FIRST DAY OF WORK

First Day of Work *

04/16/2021

- Defaults to effective date of hire or job change

END EMPLOYMENT DATE

End Employment Date

- Only required for Fixed Term employee types
  ◦ Not available for Regular and Unpaid Academic employees
- Corresponds to academic appointment end date for all titles except emeritus.

If you have an end date to enter, but the field is not available, check the employee type selection.

QUESTIONS?

ORGANIZATIONAL ASSIGNMENTS & ADDITIONAL DATA

- Academic Job Family Org Type
- Campus Mailbox (based on Supervisory Organization)
- Company
- Cost Center
- Cost Center Hierarchy
- Pay Group
- Service Period (defaults to 12 months)

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- Campus Mailbox (based on Supervisory Organization)
- Company
- Cost Center
- Cost Center Hierarchy
- Pay Group
- Service Period (defaults to 12 months)
- Supervisory Org (from the position)

OAP doesn't review these

Postdoc Anniversary Date
- Required for all Postdoctoral Scholars

Original Temporary Employment Date
- Not required for Academic Personnel

QUESTIONS?

Q: Is there a report to review service periods?

A: *Yes! R0623: Academic Positions with Invalid Service Periods. This report should be run monthly. For a full list of [Workday academic personnel audit reports](#) visit the OAP website.*

THANK YOU FOR JOINING!