

SPRING CLEANING 2021

Workday Position Data Entry for Academic Personnel



UNIVERSITY *of* WASHINGTON
OFFICE OF ACADEMIC PERSONNEL
acadpers@uw.edu | <http://ap.washington.edu/>

AGENDA

Overview of Workday Data Structures

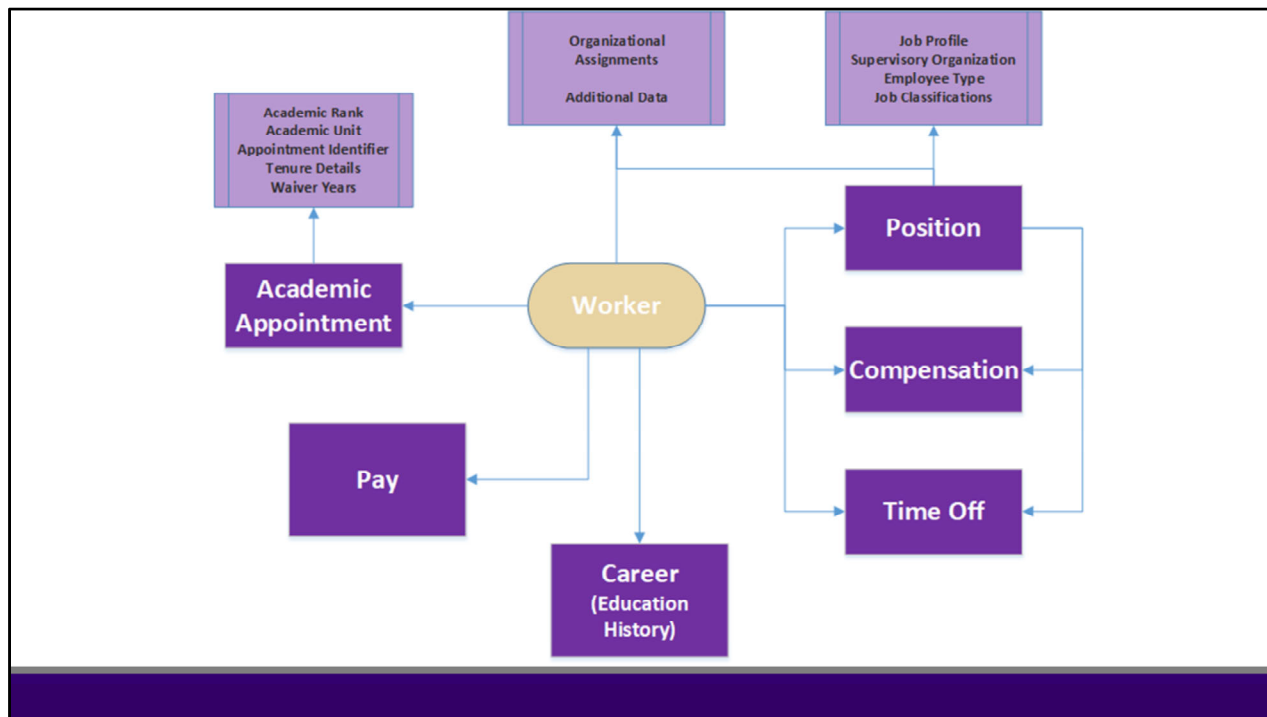
Career

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:

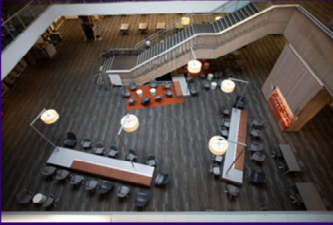
<https://ap.washington.edu/wp-content/uploads/Week-3-Academic-Appointment-Data-in-Detail-including-QA-revised-Read-Only.pdf>

<https://ap.washington.edu/wp-content/uploads/Week-2-Dates-for-Academic-Appointments-including-QA.pdf>

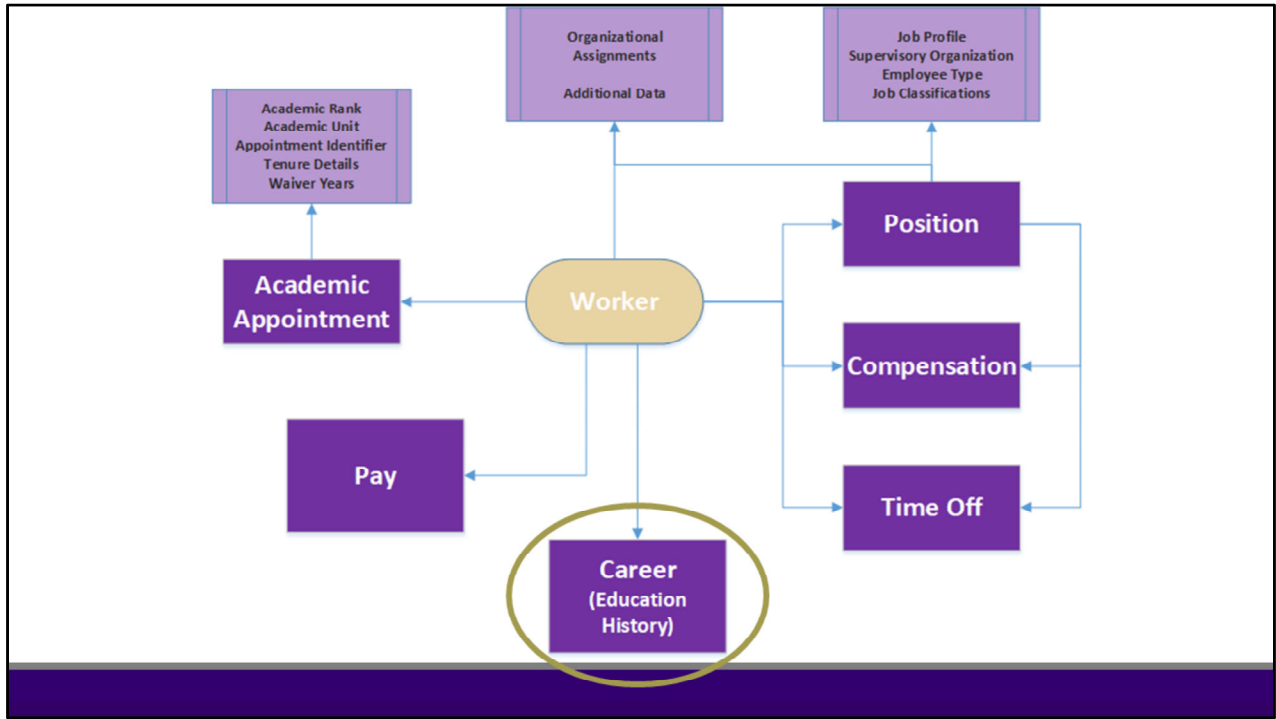
<https://ap.washington.edu/wp-content/uploads/Data-for-UW-Academic-Personnel-in-Workday-including-QA.pdf>

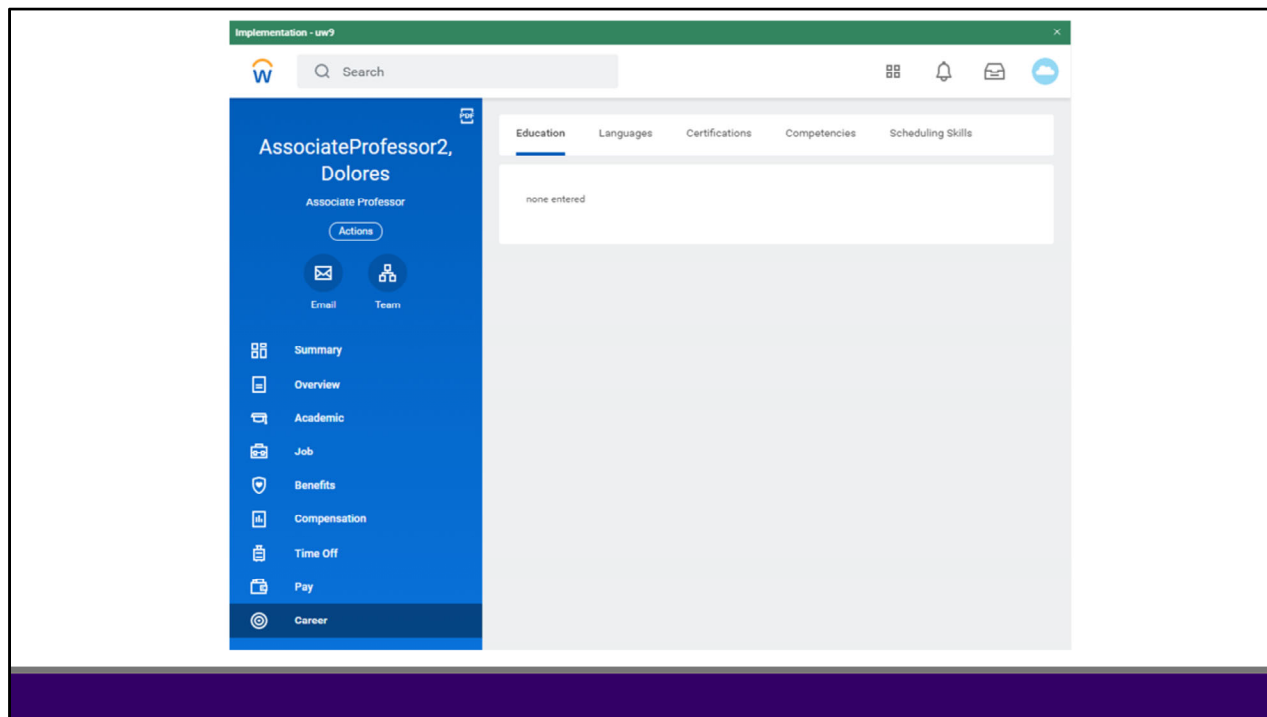
Pay contains details of costing allocations, which are outside OAP's scope, so it will not be covered in this session.

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

EDUCATION HISTORY

Implementation - uw9
On behalf of: Woman, Woodor

W Search

Add Education AssociateProfessor2, Dolores

For detailed instructions to successfully execute this process, see the [User Guide](#).

Country

School

If you cannot find the school, click here

Degree

Degree Received

Field of Study

First Year Attended

Last Year Attended

Grade Average

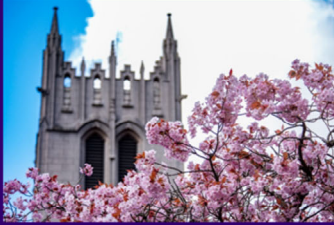
Degree options are: Medical Doctorate (MD); Doctorate (PhD); Masters (MS, MA, MBA, etc.); Bachelors (BA, BS, BAAS, etc.); Juris Doctor (JD)

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

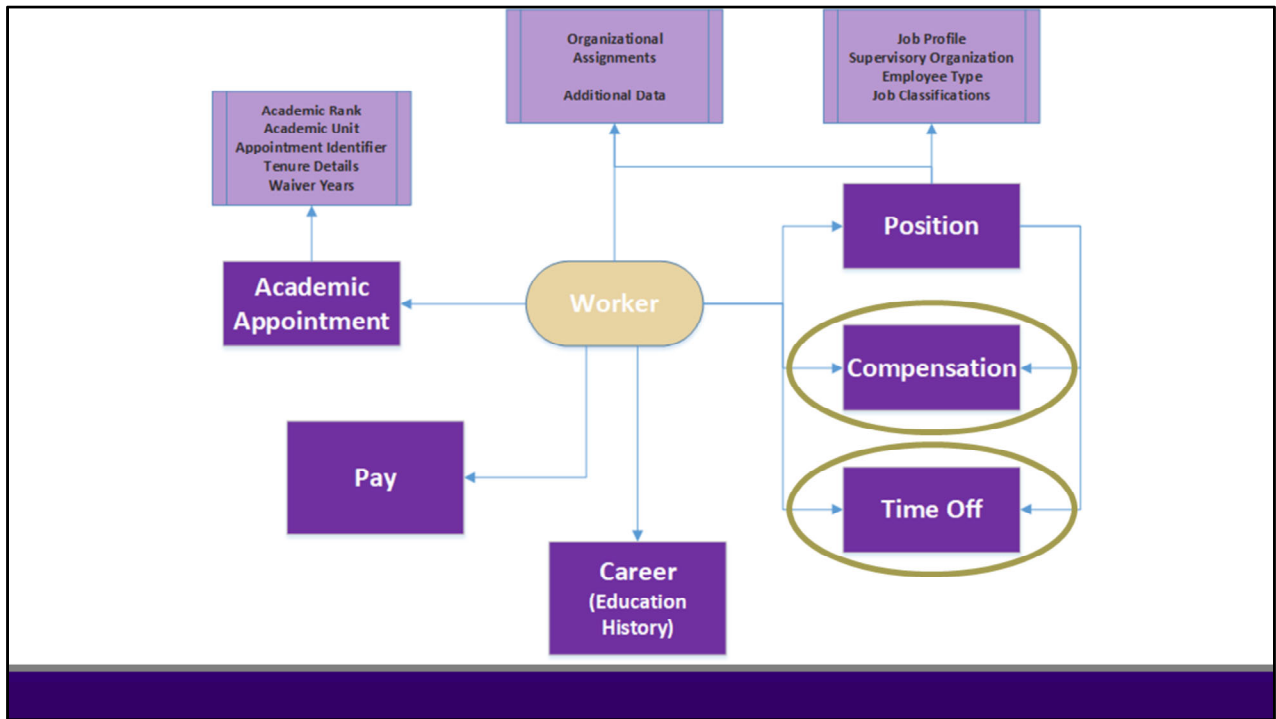
Q: Is there a report to run to see who is missing education information?

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

COMPENSATION

The screenshot displays a user interface for managing compensation. On the left is a blue sidebar with the user's name 'AssociateProfessor2, Dolores' and role 'Associate Professor'. The sidebar includes navigation links for Summary, Overview, Academic, Job, Benefits, Compensation (highlighted), Time Off, Pay, and Career. The main content area is titled 'Compensation' and has two tabs: 'Compensation' and 'Step Progression'. The 'Compensation' tab is active and contains three sections:

- Totals** (1 item): A table with columns for Total Salary & Allowances, Total Base Pay, Currency, and Frequency. The data row shows 6,000.00, 6,000.00, USD, and Monthly.
- Compensation**: A list of details including Compensation Package (General Compensation Package), Grade (AcadPers 04-AP04 Assoc Prof - Salaried), Total Base Pay Range (5,532.00 - 999,999.00 USD Monthly), and Company (UW1861 University of Washington).
- Plan Assignments** (1 item): A table with columns for Effective Date, Plan Type, Compensation Plan, and Assignment. The data row shows 09/01/2014, Salary, General Salary Plan, and 6,000.00 USD Monthly.

Totals reflect FTE adjusted values

Compensation describes the compensation package, grade, and pay range

Plan assignments are specific to the worker and position

MULTIPLE POSITIONS – PRIMARY

The screenshot shows a web application interface for an Assistant Professor. The navigation sidebar on the left includes links for Summary, Overview, Academic, Job, Benefits, Compensation (highlighted), Time Off, Pay, and Career. The main content area has two tabs: 'Compensation' and 'Step Progression'. The 'Compensation' tab is active and displays the following information:

Totals 1 item

| Total Salary & Allowances | Total Base Pay | Currency | Frequency |
|---------------------------|----------------|----------|-----------|
| | | USD | Monthly |

Compensation

Compensation Package: General Compensation Package
Grade: AcadPers 03-AP03 Assist Prof - Salaried
Total Base Pay Range: 5,085.00 - 999,999.00 USD Monthly
Company: UW1861 University of Washington

Plan Assignments 2 items

| Effective Date | Plan Type | Compensation Plan | Assignment | End Date |
|----------------|-----------|---------------------|------------|------------|
| 09/01/2020 | Salary | General Salary Plan | | 06/30/2026 |
| 09/01/2020 | Allowance | UWP - Practice Plan | | 05/30/2025 |

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

MULTIPLE POSITIONS – ADDITIONAL

The screenshot displays a web application interface for compensation management. The left sidebar shows a navigation menu with options: Summary, Overview, Academic, Job, Benefits, Compensation (selected), Time Off, Pay, and Career. The main content area is titled 'Compensation' and 'Step Progression'. It features a 'Totals' table with 1 item, a 'Compensation' section with key details, and a 'Plan Assignments' table with 1 item.

| Total Salary & Allowances | Total Base Pay | Currency | Frequency |
|---------------------------|----------------|----------|-----------|
| | | USD | Monthly |

Compensation

Compensation Package: General Compensation Package
Grade: AcadPers 03-AP03 Assist Prof - Salaried
Total Base Pay Range: 5,085.00 - 999,999.00 USD Monthly
Company: UW1861 University of Washington

| Effective Date | Plan Type | Compensation Plan | Assignment | End Date |
|----------------|-----------|-------------------|------------|------------|
| 09/01/2020 | Salary | PDR Salary | | 06/30/2026 |

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 & LEAVES

Implementation - uw9

AssociateProfessor2, Dolores

Associate Professor

Time Off Balance | UW - Months of Service | FMLA Leave Balance

Balances Tracked in Days: 3 items

| Absence Plan | Unit of Time | Position | Beginning Year Balance | Accrued Year To Date | Absence Paid Year To Date | Beginning Period Balance | Accrued in Period | Absence Paid in Period | Carryover Forfeited in Period | Ending Period Balance | Ending Period Balance Including Pending Events | As of Period |
|---|--------------|--------------------------------|------------------------|----------------------|---------------------------|--------------------------|-------------------|------------------------|-------------------------------|-----------------------|--|---|
| Sick Time Off Plan - Faculty (days) | Days | PN-8999181 Associate Professor | 0 | 90 | 0 | 90 | 0 | 0 | 0 | 90 | 90 | 04/01/2021 - 04/30/2021 (UW Monthly) |
| FFRA Emergency Paid Sick Time Off - Family (days) Time Off Plan | Days | PN-8999181 Associate Professor | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 04/12/2021 - 04/18/2021 (UW Weekly (M-S)) |
| FFRA Emergency Paid Sick Time Off - Self (days) Time Off Plan | Days | PN-8999181 Associate Professor | 10 | 0 | 0 | 10 | 0 | 0 | 0 | 10 | 10 | 04/12/2021 - 04/18/2021 (UW Weekly (M-S)) |
| Total: | | | | | | | | | | 10 | 100 | |

Time Off includes details of balances and times off taken

Time Off Balance UW - Months of Service FMLA Leave Balance

Balances Tracked in Days 3 items

| Absence Plan | Unit of Time | Position | Begin |
|--|--------------|-----------------------|-------|
| Sick Time Off Plan - Faculty (days) | Days | Senior Fellow Trainee | |
| FFCRA Emergency Paid Sick Time Off - Family (days) Time Off Plan | Days | Senior Fellow Trainee | |
| FFCRA Emergency Paid Sick Time Off - Self (days) Time Off Plan | Days | Senior Fellow Trainee | |

Balances Tracked in Hours 4 items

| Absence Plan | Unit of Time | Position | Begin |
|--|--------------|--------------------------------|-------|
| Vacation Time Off Plan (hours) | Hours | Fellow ACGME (E S RFPU-NW) (+) | |
| Sick Time Off Plan - calendar year (hours) | Hours | Fellow ACGME (E S RFPU-NW) (+) | |
| Personal Holiday Time Off Plan (hours) | Hours | Fellow ACGME (E S RFPU-NW) (+) | |
| Holiday Credit Time Off Plan (hours) | Hours | Fellow ACGME (E S RFPU-NW) (+) | |

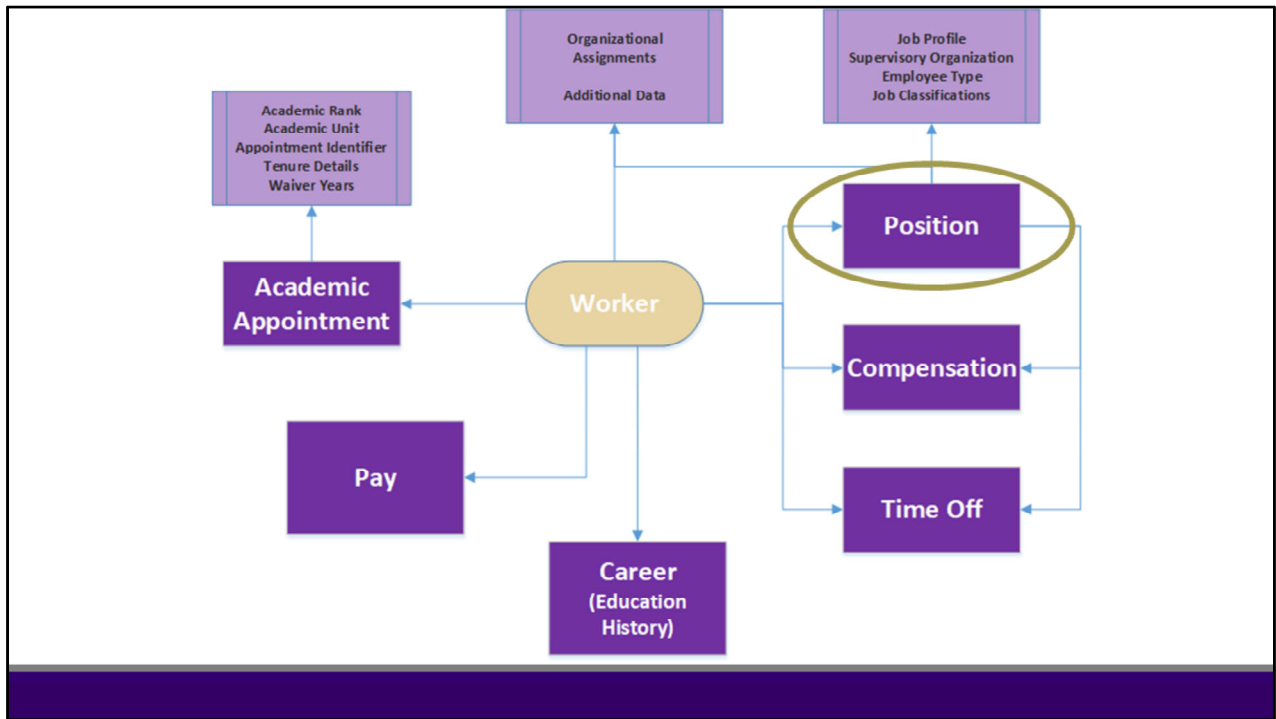
Example of a worker with two positions, each with a different leave accrual structure. Both leave accrual schedules show on the Time Off Balance tab regardless of which position is selected.

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 | <input type="text" value="X Associate Professor ..."/> |
| Job Description Summary | <input type="text" value="Associate Professor"/> |
| Job Description | <div><p>Format B <i>I</i> <u>U</u> A ■ </p><hr/><p></p></div> |
| Location | <input type="text" value="X Seattle Campus ..."/> |
| Time Type | <input type="text" value="X Full time"/> |
| Worker Type | <input type="text" value="X Employee"/> |
| Worker Sub-Type | <input type="text" value="X Regular"/> |

SUPERVISORY ORGANIZATION

- Identifies manager/managerial organization
 - Managers of supervisory organizations sit in the next org up in the hierarchy
- Selected when creating the position

Create Position

The Availability Date and the Earliest Hire Date fields **must be equal to or earlier** than today's date.
For detailed instructions to successfully execute this process, see the [User Guide](#).

Supervisory Organization *

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 ⋮

- 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

x Seattle Campus ...



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

** International Locations need OAP approval

TIME TYPE

Time Type

x Full time

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

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

WORKER TYPE

Worker Type

x Employee



- **Employee**
 - Use for all academic personnel
- **Contingent Worker**
 - Do not use for academic personnel

WORKER SUB-TYPE

Worker Sub-Type

× Regular



- **Unpaid Academic**
 - Only use with Unpaid Academic job profile
- **Regular**
 - Professor
 - Associate Professor
 - Professor Without Tenure
 - Associate Professor Without Tenure
 - Librarian
 - Associate Librarian
 - Administrative job profiles
- **Fixed Term**
 - Use with all other academic job profiles
- **PDR (Paid Direct)**
 - Use for anyone being paid directly by another institution (e.g. Fred Hutch, Veterans' Administration, etc)
- **Practice Plan**
 - Use for anyone being paid through UW Physicians Practice Plan or CUMG Practice Plan

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?



- 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

Add Job Associate Professor, Debrae Gotham University Academic (Exam, Clerk)

Please confirm the Supervisory Organization. If adding a job in a JM Supervisory Organization, update to the appropriate JM Organization. For detailed instructions to successfully execute this process, see the [Job Guide](#).

| | | |
|---|--|---|
| Effective Date 04/01/2021 | Additional Details | |
| Reason ADD ADDITIONAL EMPLOYEE JOB | Job Title Associate Professor | |
| Job Details | Business Title Associate Professor | |
| Position Search | Location Weekly Hours 40 | |
| Employee Type Regular | Default Weekly Hours 40 | |
| Job Profile Associate Professor | FTE 100% | |
| Time Type Full Time | Annual Work Period (empty) | |
| Location Seattle Campus | Work Period Percent of Year (empty) | |
| Pay Rate Type Salary | Disbursement Plan Period (empty) | |
| Scheduled Weekly Hours 40 | Job Exempt <input checked="" type="checkbox"/> | |
| | Job Category Faculty | |
| | Job Classifications 0110 - Faculty (Financial Account Codes (Object Codes)) | |
| | | 021 - Faculty & Senior Fellows (Absence Management Job Eligibility Code) |
| | | 25-1199 - Postsecondary Teachers, All Other (US Standard Occupational Classifications (SOC) United States of America) |
| | | 3 - Professionals (Including Faculty) (EEO1 Code) |
| | | Academic Personnel - Academic Personnel (Civil Service & Other Exempt Staff) |
| | | More (3) |
| | | Additional Job Classifications <input type="text"/> |
| | | Company Insider Types <input type="text"/> |
| | | Workers' Compensation Code from Job Profile 4906 - PUBLIC INSTIT - HIGHER LEVNG (United States of America) |
| | | Workers' Compensation Code Override <input type="text"/> |
| | | Work Shift <input type="text"/> |
| | | First Day of Work 04/01/2021 |
| | | End Employment Date <input type="text"/> |
| | | Exclude from Headcount <input type="checkbox"/> |


Values appear in different orders/sections when adding versus editing


JOB DETAILS


Effective Date * 04/01/2021 


Reason * Add Additional Employee Job > 
 Add Additional Job > Add Additional Job


Job Details


Position * Search 
 PN-8801213 Associate Professor 2 ...

Employee Type * Regular 

Job Profile * Associate Professor ... 

Time Type * Full time 

Location * Seattle Campus ... 

Pay Rate Type Salary 

Scheduled Weekly Hours 40

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

Additional Details

| | |
|-----------------------------|---|
| Job Title | <input type="text" value="Associate Professor"/> |
| Business Title | <input type="text" value="Associate Professor"/> |
| Location Weekly Hours | 40 |
| Default Weekly Hours | <input type="text" value="40"/> |
| FTE | 100% |
| Annual Work Period | (empty) |
| Work Period Percent of Year | |
| Disbursement Plan Period | (empty) |
| Job Exempt | <input checked="" type="checkbox"/> |
| Job Category | Faculty |
| Job Classifications | 0110 - Faculty (Financial Account Codes (Object-Codes)) 021 - Faculty & Senior Fellows (Absence Management Job Eligibility Code) 25-1199 - Postsecondary Teachers, All Other (US Standard Occupational Classifications (SOC)-United States of America) 3 - Professionals (Including Faculty) (EEO1 Code) Academic Personnel - Academic Personnel (Civil Service & Other Exempt Staff) More (3) |

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 | <input type="text"/> |
| Company Insider Types | <input type="text"/> |
| Workers' Compensation Code from Job Profile | 4906 - PUBLIC INSTIT - HIGHER LRNG (United States of America) |
| Workers' Compensation Code Override | <input type="text"/> |
| Work Shift | <input type="text"/> |
| First Day of Work | <input type="text" value="04/01/2021"/> |
| End Employment Date | |
| Exclude from Headcount | <input type="checkbox"/> |

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

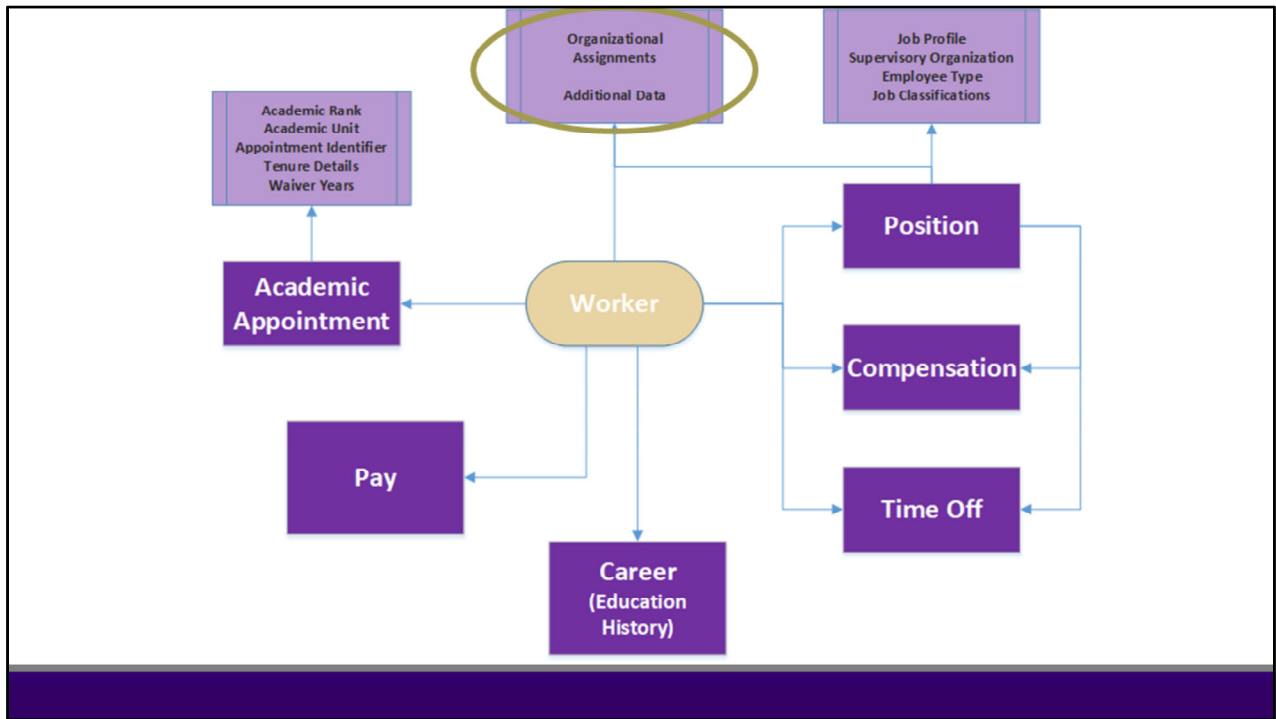
- Only required for Fixed Term employee types
 - Not available for Regular and Unpaid Academic employees
- Corresponds to academic appointment end date for all titles except emeritus.

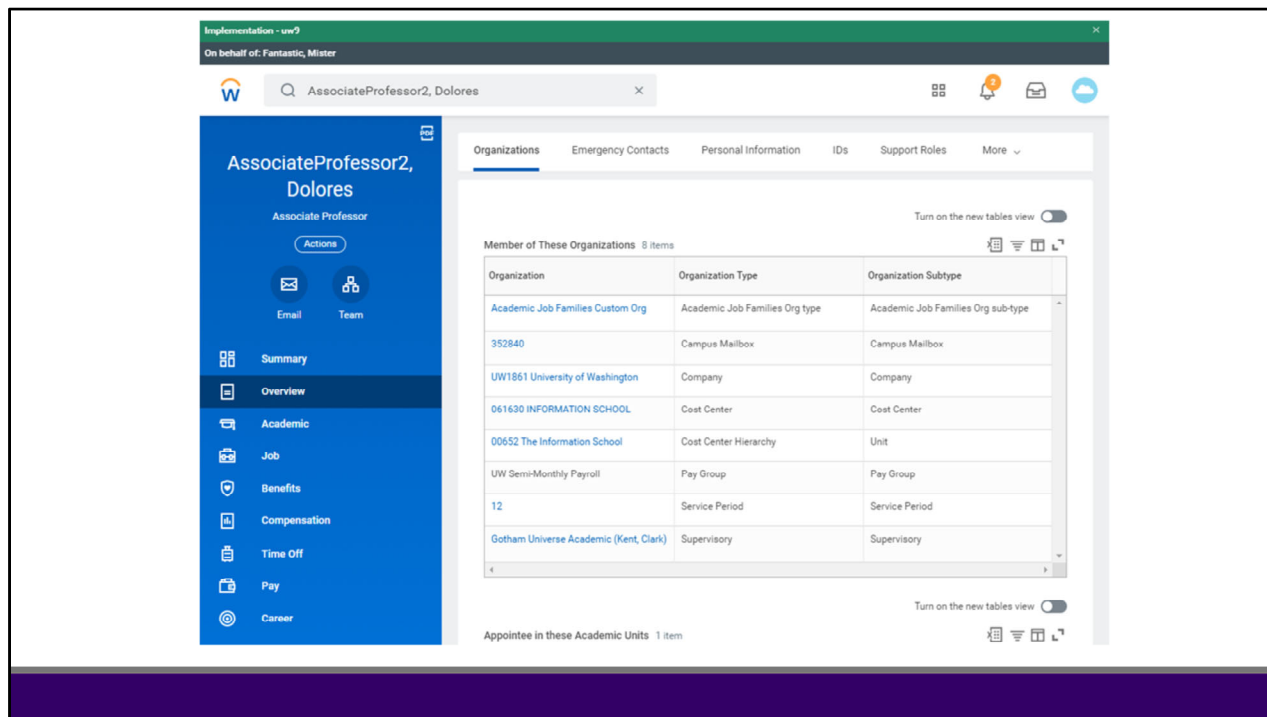
If you have an end date to enter, but the field is not available, check the employee type selection.

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)













INHERITED & DEFAULTED VALUES

Member of These Organizations 8 items

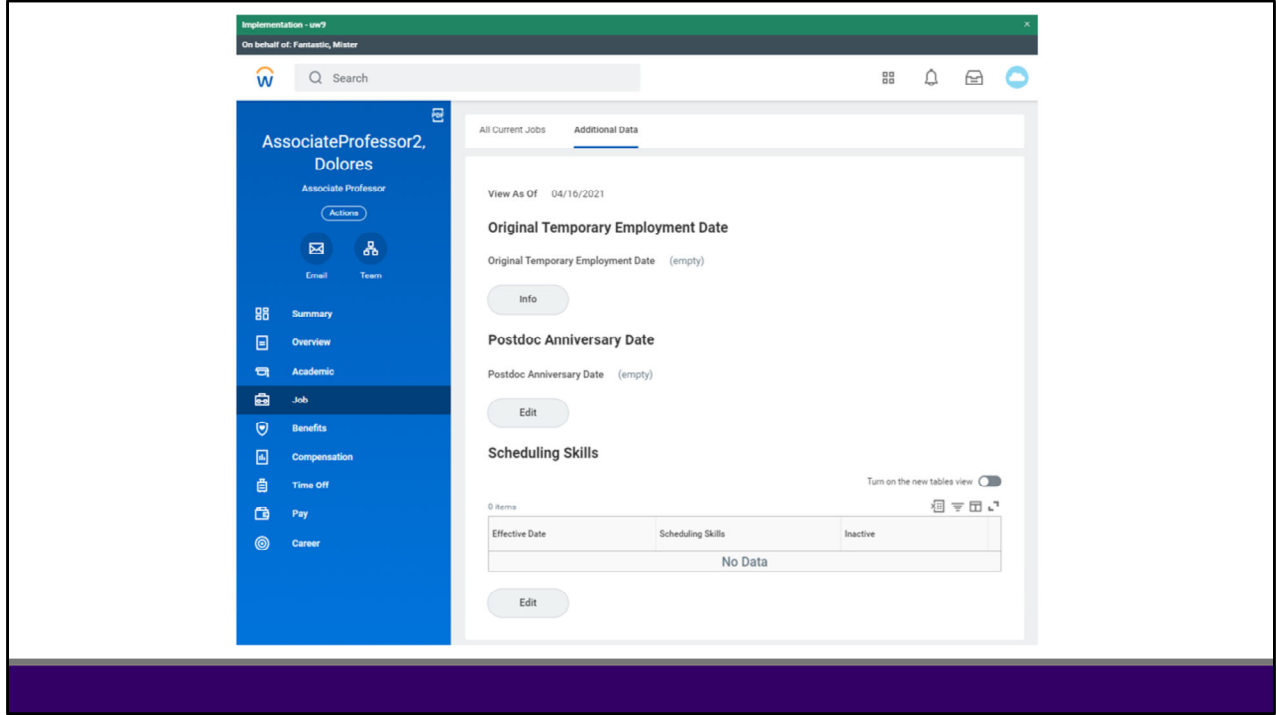
| Organization | Organization Type | Organization Subtype |
|--|--------------------------------|------------------------------------|
| Academic Job Families Custom Org | Academic Job Families Org type | Academic Job Families Org sub-type |
| 352840 | Campus Mailbox | Campus Mailbox |
| UW1861 University of Washington | Company | Company |
| 061630 INFORMATION SCHOOL | Cost Center | Cost Center |
| 00652 The Information School | Cost Center Hierarchy | Unit |
| UW Semi-Monthly Payroll | Pay Group | Pay Group |
| 12 | Service Period | Service Period |
| Gotham Universe Academic (Kent, Clark) | Supervisory | Supervisory |

- 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)
- Supervisory Org (from the position)

OPTIONAL ASSIGNMENTS

| | | | |
|------------|---|---|---|
| UW Project |  | Medical Centers (custom org) |  |
| UW Task |  | Advancement (custom org) |  |
| UW Option |  | UTemp Staffing (custom org) |  |
| Work Study |  | FERPA |  |
| | | Fidelity - Temporary |  |
| | | LEM Leaders |  |
| | | Performance Review Alternate (org type) |  |
| | | Academic Job Families Org type |  |

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!