Faculty Workload Process
The steps you take...

- Enter AWTU in Term Workload – the prior semester
- Assign faculty to classes – before the semester starts
- Consult the checklists, emails, reminders
- Review the workload report as it’s refreshed
- Check your Department Review assigned date
  - Trade emails with Jennifer and do clean-up
- Wait for final review email w/summary
- Gather your docs for signature IF your college requires that
- Archive your workload report detail and summary pages, AWTU requests, and AWTU reports in case you need to refer to them later
  - (HINT: you will need them for 5-year reviews)
2 biggest issues with workload?

**CLASS setup!**

1. **Empl Rcd**
   - On the class
   - For AWTU, in Term Workload, Job Code tab

2. **Space Type**
What is it? Why do we do it? When?

Reconciles faculty pay with faculty work
- HR contract vs. the work being generated through classes (weighted teaching units, or WTU)

**Assigned** time (AWTU) may fill the gaps
- Grants and Projects
- Awards
- “Release Time”
- Additional assignments

We begin “doing workload” when we build our schedules
- Choosing the correct Instruction Mode (MOI)
- Building the meeting patterns correctly
- Assigning faculty to sections

The “Workload Report”, aka the FAD (Faculty Assignments by Department) is a report required by the Chancellors office for all state supported terms.

This report is a statistical powerhouse -- reporting how many classes were offered, how many faculty it took to teach those classes, how many rooms and what type of rooms were used, as well as any time faculty are doing something other than teaching (faculty “release time”, aka AWTU).

The Workload report is NOT used to calculate pay for faculty; nor track when faculty are on FERP, Difference in Pay leave (DIP), medical/family leave, or sabbatical.
Where do you find the information?
(Bookmarks are your friend)

www.csuchico.edu/apss

APSS email communications

2222 Workload Begins!  (keep this email)

Dear ASCS,
Welcome to the official start of the Spring 2022 faculty workload process!
• This is your primary communication about workload
• Future emails will be more task-specific, so please keep this one

• Due dates and additional information is kept in our shared Box folder “APSS-Shared > WORK DOCUMENTS”
  - Workload Checklist — please work through this, because APSS is not going to point
  - Workload Due Dates
  - Changes to the Workload Process — a comprehensive collection of communications

• The workload report is available several times a week in Box, usually by 3:00pm (Workload)
  - Check for the current date in the upper left corner of the report.
  - I am running the report on my work from home days: Monday, Wednesday, Thursday
  - The AWTU Report may also be available, but you should plan to run it yourself in CMSS
  - TODAY'S REPORT HAS ERRORS HIGHLIGHTED [AWTU By Term 2222]

• AWTU help is also in Box:
  - AWTU help guide
  - AWTU funding source examples

Workload Review Days
• in lieu of asking you to sign up for your Department review:
Workload Checklist
(see Box, in the APSS-Shared > Workload folder)

First few steps:
- Refer to the Workload-due-dates-2021-2022 PDF in our shared Box folder and its At-A-Glance Workload “To Do” list.
- Enter all faculty AWTU, including the Assign Type Reason information, by adding lines to the Term Workload page. Entries should match the APPROVED Faculty Request for AWTU forms submitted by the instructor. Confirm correct EMPL RCD.
  - This is typically done the prior semester.
- Payback-eligible AWTU is entered/managed by the HOME department.
- Check the Term Workload > Job Code tab to be sure all assignments are under the correct job code (empl record). Fix here for AWTU; in Maintain for incorrect class assignments.
- Enter the Chair IAF (Instructional Administrative Fraction) and AWTU line, including the Workload Reason (Department Chair 12-month or AY) and Time Source code (Unreimbursed) in the Assign type Reason fields. Confirm correct EMPL RCD.

- Gather your faculty contracts, AWTU requests, and schedule docs (Cost of Instruction workbook, aka the FAR—use CRA job 1388 to update it; FUR or FUS; Class Schedule-Build report; etc.)

The checklist is 3 pages of pretty helpful hints; Check Box!
Assigning faculty to classes

![Image of a user interface for assigning faculty to classes]
Why can’t I find my faculty in the list?

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Equals</th>
<th>Wildcards</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>text</td>
<td>begins with</td>
<td>▼</td>
</tr>
<tr>
<td>Campus ID</td>
<td>text</td>
<td>begins with</td>
<td>▼</td>
</tr>
<tr>
<td>Local Campus ID</td>
<td>text</td>
<td>begins with</td>
<td>▼</td>
</tr>
<tr>
<td>National ID</td>
<td>text</td>
<td>begins with</td>
<td>▼</td>
</tr>
<tr>
<td>Last Name</td>
<td>text</td>
<td>begins with</td>
<td>▼</td>
</tr>
<tr>
<td>First Name</td>
<td>text</td>
<td>begins with</td>
<td>▼</td>
</tr>
</tbody>
</table>

- Include History: □
- Correct History: □
- Case Sensitive: □

Limit the number of results to (up to 300): 300
Instructor/Advisor Table
(have you used the PS Search?)

YOU WILL NEED TO ADD A RECORD AND KEEP ALL RECORDS ACTIVE

Start on this tab

Go here

ONLY 8/1 or 1/1

Add a row; do not delete or inactivate any rows

Choose Instructor Type

Add or lookup your Acad Org; there can only be one Primary department
Instructor/Advisor Table
Approved Courses tab

- Instructor: Sandrine Matiasek
- Seq Nbr 1 should match Primary Acad Org
- Add rows to activate instructor for other departments
WTU (Workload)

Weighted Teaching Units are the values instructors earn for teaching. Each Course Classification (Activity Type) has a set number of WTU earned per unit (or per student for supervision classifications). Please refer to the Course Classification Listing on the APSS website for the WTU amounts earned for each classification type. Next, consult your Cognos Course Inventory report if you’re not familiar with the Course Classification(s) for a course. There is also a report (#844) available on the CR&A sight that will tell you how much WTU each course will generate, WHEN THERE IS ENROLLMENT.
Calculating faculty workload...  
...it’s your CHAIR’s job

- CS (activity) type and unit value = WTU
  - CS78 generates zero WTU
  - Classes with different CS numbers will NOT collapse the WTU
- Classes with different suffix letters will not collapse automatically - let APSS know
- Classes with different meeting patterns will not collapse EVER

- CRA 1388, WHEN THERE IS ENROLLMENT
  - But, the Cognos reports can give you much of the information the FAR does

- Rank...when a Lecturer becomes a Tenure-track faculty, please update the Instructor/Advisor Table
  - ADD a new row, complete all the required fields and save
  - (Also when they: are granted Tenure (aka Assistant to Associate), or move up to Full Professor)

- Ask your Chair for ALL the info!
  - Contracts
    - Class Assignments
    - Supervision Courses
    - AWU - especially for New Faculty Release (NFR)
      - Grants, Committee work
  - FAR / FUR / FUS
Now what do I do?

Instructor Term Workload:
APDB Departmental Assignments -- Split Appointments

**EFFECTIVE FALL 2021 WE ARE NO LONGER ENTERING NON-CONTRACT SPLIT S**

If an instructor has contracts in more than one department, THEN there will be multiple rows in the APDB Departmental Assignment box.

*Or, if they have CSE GRANT RELEASE (132-RESP, 132-RCEP).*

**ONLY** your entries need to be correct for your workload to be “done” – but for those shared faculty, be sure to check that your entries have not been changed by mistake, before you submit final workload.
IFF assignments
(and ghost records & other unreliable Term Workload data):

If you see something off on this page, please let APSS know right away!

Live example from 2192:
△ 130-19 assigned to someone else
△ 130-17 cancelled
△ 130-21 cancelled
△ 130-20 assigned to this instructor and isn’t showing up
△ Look at the Work Load column below…it’s still somewhat unreliable!
Always look at the Job Code tab; it will tell you:

- Incorrect Empl Rcd on class assignments = correct on Class
- Incorrect Empl Rcd on AWTU assignments = correct HERE
Job Code tab for AWTU

- PeopleSoft will OFTEN insert the incorrect Empl Rcd on AWTU
  - Use the Look Up
  - You can use this look up to check your IFF assignments, too!

- Make this a habit to check every time you’re in Term Workload
AWTU
– Assigned Weighted Teaching Units

**AWTU**

Assigned **Weighted Teaching Units** are used to account for any release time given to instructors to do work other than actual teaching in the classroom, or in some cases to account for a higher than normal teaching load such as teaching jumbo (high enrollment) sections. The entries are made in PeopleSoft under Curriculum Management>Instructor/Advisor Information>Instructor Term Workload. Navigate to the appropriate term using the “Find” feature or using the arrow buttons on the upper right of the screen. (NEVER type the term in or used the look up feature for the term code – you will get weird scrambled data.) Click on the “plus” button on the right to add a new line.

**For standard departmental AWTU** enter a description, Assign Type (see chart of codes & descriptions), APDB Dept Id (usually your dept id), and WTU to be assigned.

**For IAF AWTU** (Administrative appointments) enter a description, Assign Type is “IAF”, click on the **Assign Type Reason** link, enter the type of appointment and the source code then click “OK”, enter the APDB Dept Id (usually your dept id), and WTU to be assigned. Never use a college Dept Id (2 digits) for any type of AWTU assignment.

**For CSE (RESP) AWTU** (Grants & Projects/Reimbursed) enter a Description using the GRANT NAME (the project number goes in the Source area under Assign Type Reason), Assign Type (usually code 22), APDB Dept ID (always 132-RESP), and the WTU under Work Load.

Make sure that there is an APDB Departmental Assignment given for all APDB Dept IDs listed. (The instructor must also have an assignment to all APDB depts in the Instructor/Advisor Table.)
# AWTU – Assign Type Codes and Definitions

http://www.csuchico.edu/apss/_assets/documents/awtu-codes-definitions.pdf

## California State University, Chico

### AWTU Codes and Definitions

<table>
<thead>
<tr>
<th>Code Number</th>
<th>Code Description</th>
<th>Chancellor's Office Definition</th>
<th>Description to Use</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Excess Enrollments</td>
<td>a. For classes with census date enrollment of between 75 and 120 and exceptional workload, a</td>
<td>List each qualifying course-section, with (enrollment), Individually.</td>
<td>Appropriate Uses: Release time for enrollments over 120</td>
</tr>
<tr>
<td></td>
<td></td>
<td>graduate assistant or student assistant may be allocated.</td>
<td></td>
<td>Not Appropriate Uses: Release time for enrollments under 120 students (currently at Dears’ discretion)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>b. For classes with census date enrollment over 120, a graduate assistant, a student assistant, or an additional 3 WTU may be assigned.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>New Preparations</td>
<td>A faculty member may be given assigned WTU for preparation of courses never before taught by that particular faculty member, if courses actually taught include two or more such new preparations.</td>
<td>List qualifying course(s) and section(s).</td>
<td>Appropriate Uses: For a course never taught by the faculty member</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Not Appropriate Uses: New course development (use #33)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>New Faculty Release (NFR) - new course prep (use #35)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>New Faculty Release (NFR) - Research (use #36)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>New faculty mentors (use #23)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>New program development (use #33)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Professional growth (use #22)</td>
</tr>
<tr>
<td>14</td>
<td>Course or</td>
<td>A faculty member may be given assigned WTU equal to course</td>
<td>List qualifying course(s)</td>
<td>Appropriate Uses:</td>
</tr>
</tbody>
</table>
How do I choose?
See the AWTU help guide in Box

Sections and steps (use hyperlink to jump to that section):
A. Assigning AWTU
   1. Workload Assignment tab
   2. Job Code tab
B. Chair assignments (IAF)
C. Assign Type Reason
   1. Related Class
D. AWTU by Term report
E. Types of AWTU
   1. AWTU Certification
F. Time Source Code examples

F. AWTU Time Source Code

External Reimbursed (former)
- Chancellor’s Office
- CO Funded Proven Concept
- Graduation Initiative
- Local CFA President
- FCE-related course reimbursement
- Research and Sponsoring
- Research Foundation
- Research, Scholarship
- RSG grants
- Statewide Academic
- Statewide CFA Representative
- University Foundation

Internal Reimbursed (NEW):
- Assessment
- CFA Representative
- Chico State Academic
- Diversity Officer
- Exceptional Service
- FDEV-funded Grants
- Honors Director
- IR Fellow
- Pathway Coordinator

Unreimbursed:
- Accreditation-related
- Advising
- Center Directors (CHS)
- College Academic Services
- Excess Enrollment (A)
- Grad Coordinator
- Lab Coordinator
- New Faculty Release
AWTU costing

Associating AWTU cost with Class

- Select section from Related Class menu, under Assign Type Reason
- **RARE:** Description field SHOULD ONLY contain the #Regs number FOR COMBINED SECTIONS, 1* section

Assign Type Reason

- For reimbursed AWTU, Source and Rate are REQUIRED
The Workload Report... is a searchable PDF
Split appointments = ONLY when the instructor has a CSE (RESP) grant

Otherwise, it’s just “multiple” APDB assignment rows, but only ONE can be primary:

Workload report,
Term Workload

Other department’s workload report
PeopleSoft – Faculty Teaching Schedule:
if you need to look up someone you’re “sharing”
Random details that may or may not apply to some or all of you!

- **Combined sections**
  - WTU Collapsed
  - They don’t always collapse

- **Preventing the WTU from collapsing**
  - Group Control Codes

- **Team-taught courses**

- **Split appointment max = 3**

- **Chairs = IAF assignment**

- **Volunteers = OSF assignment**

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**Combined Classes**

Combined Classes are classes that are taught at the same time, in the same room by the same instructor(s). They are combined using the Combined Sections Table in PeopleSoft. These classes will “collapse” the WTU earned for the instructor. For example, if there are two 3-unit lecture courses combined, the instructor will earn 3 WTU, not 6 WTU, for teaching the two combined classes. There can be a few things that will prevent combined classes from “collapsing” the WTU – different CS numbers, different locations (wwwonline + MLIB031) for example. In these instances the dept needs to email APSS with the details and what they need to report on the Workload.

**IAF - Administrative Appointments**

When an instructor is appointed to a chair, (and sometimes dean, associate or assistant dean, program coordinator position if they are also teaching classes) or any appointment that will be paid from administrative (rather than instructional) funds, an AWTU entry must be made for this appointment. The WTU for administrative appointments does not show up on the Workload report as a separate line item. Only the percent of the IAF appointment and the Workload Reason code show up on the 1st line of the instructor’s detail. When you are looking at the total WTU for an instructor remember that you will need to add in the WTU for administrative appointments to get an accurate total for any one with an administrative appointment.

**OSF - Volunteers**

Occasionally we have “volunteer instructors”, people that for one reason or another are teaching a class and will not be paid. (Sometimes these are staff that teach as part of their staff position duties.) They will have entries in the Instructor/Advisor table, the Term Workload page and be assigned to the class. Their assignments are entered under the “OSF” category, rather than the IFF or IAF, and they normally do NOT have an HR contract. Calculate their fraction by dividing the total generated WTU by 15.
The steps you take...

- Enter AWTU in Term Workload – the prior semester
- Assign faculty to classes – before the semester starts
- Consult the checklists, emails, reminders
- Review the workload report as it’s refreshed
- Check your Department Review assigned date
  - Trade emails with Jennifer and do clean-up
- Wait for final review email w/summary
- Gather your docs for signature IF your college requires that
- Archive your workload report detail and summary pages, AWTU requests, and AWTU reports in case you need to refer to them later
  - (HINT: you will need them for 5-year reviews)
How can I be sure I’ve done it all correctly?
Box: APSS-Shared > WORKLOAD-depts

- This shared folder is where you’ll find all things workload:
  - Guides
  - Lists
  - Sign-ups
  - Latest report on Workload
  - AWTU by Term report
    - run it yourself as needed; APSS will only generate this occasionally
In Summary...

- Why, What, How, When, Where
- Assignments
- Checklists
  - Box
- Review Process
- Deadlines

- If you start to feel frustrated, CALL!
- You only do this twice a year. Breathe.
Resources

Jennifer L. Aceves, Class Scheduling and APDB Specialist

- apss@csuchico.edu
- 898-4688 (but email is best)

http://www.csuchico.edu/apss

Click on the “Faculty Workload” link on the left navigation bar to find:

- Explanation of the “why”
- AWTU Codes and Definitions
- How to read the workload report

Check Box for more stuff

- Due Dates
- Workload Checklist
- Helpful guides (in progress – ask if you don’t see what you’re looking for!)

This training revised February 22, 2022