Faculty Workload Process
2 biggest issues with workload

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

2. Assign Type Reason
What is it? Why do we do it? When?

Reconciles faculty pay with faculty work
  - HR contract vs the work being generated through classes (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
  - Assigning faculty to courses

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, AWTU).

The Workload report is NOT used to calculate pay for faculty or track when faculty are on FERP, Difference in Pay leave (DIP), or sabbatical.
Where do you find the information?
(Bookmarks are your friend)

www.csuchico.edu/apss

APSS email communications

Welcome to the official start of the Fall 2019 faculty workload process!

- This is your primary communication about workload
- Future emails will be more task-specific, so please keep this one

- The workload report is available daily on the workload website, usually by 9:00am.
  - The workload report PDF AND the AWTU Report are also available in our shared B drive.
  - Check for the current date in the upper left corner of the report.
  - If you’d like a refresh more frequently as we approach the due date, send me an email.

- Please visit the APSS website for due dates and guidance; you’ll also find this information in the shared folder which you are already a member if you are an academic ASC. The documents I used to attach:
  - Workload Checklist
  - FTEs Traded Due Dates
  - Workload Due Dates

- Additional help is also in the shared folder:
  - AWTU help guide
  - AWTU funding source examples
First few steps:

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

- Enter all faculty time bases (assignment percent) in PeopleSoft, Term Workload page in the APDB Departmental Assignment box. This must match the faculty’s contract (NOT the sum of all A/WTU).

- Enter all faculty AWTU, including the Assign Type Reason information, by adding lines to the Term Workload page. Delete any old AWTU entries.

- Enter all Chair IAF fractions and line items, indicating the Reason and Time Source codes in the Assign type Reason fields.

- Check the Term Workload > Job Code tab to be sure all assignments are under the correct job code (empl record).

- Add FTES Trades attributes on the appropriate class sections, for FTES you are giving to the other department (or, prompt departments to enter for FTES you are expecting). Next day, run and check the FTES Trades report from the Workload web site.

The checklist is 3 pages of pretty helpful hints; did you get a handout?
Assigning faculty to classes

### Course Information
- **Course ID:** 020723
- **Academic Institution:** California State Univ, Chico
- **Term:** Fall 2019
- **Subject Area:** GEOS
- **Catalog Nbr:** 265
- **Course Offering Nbr:** 1
- **Course:** Undergrad Geosciences, Soils and Surficial Processes

### Class Sections
- **Session:** 1
- **Class Section:** 01
- **Component:** Lecture
- **Associated Class:** 1
- **Units:** 3.00
- **Class Nbr:** 4528
- **Event ID:** 000134055

### Meeting Pattern
- **Facility ID:** FHSC202
- **Capacity:** 49
- **Pat:** TR
- **Mtg Start:** 1:00PM
- **Mtg End:** 1:50PM
- ***Start/End Date:** 08/26/2019 to 12/20/2019

### Instructors for Meeting Pattern
- **ID:** 006559814
- **Name:** Mallasek, Sandrine J
- **Role:** Prim Ins
- **Print:** Approved

### Additional Information
- **Job Code:** 2360
Why can’t I find my faculty in the list?
Instructor/Advisor Table

(have you used the PS Search?)

- Start on this tab
- Go here
- Effective Date can ONLY be 8/1 or 1/1
- Add or lookup your Acad Org; there can only be one Primary department
- Choose Instructor Type
- There can only be one active record
Instructor/Advisor Table
Approved Courses tab

<table>
<thead>
<tr>
<th>Instructor Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
</tr>
<tr>
<td>Status</td>
</tr>
<tr>
<td>Instructor Type</td>
</tr>
<tr>
<td>Academic Institution</td>
</tr>
<tr>
<td>Primary Acad Org</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Course Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seq Nbr</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
</tbody>
</table>

Seq Nbr 1 should match Primary Acad Org
Add rows to activate instructor for other departments

Here next!
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. There is also a report (#844) available on the CR&A sight that will tell you how much WTU each course will generate.
Calculating faculty workload...
...it’s your CHAIR’s job

- CS (activity) type and unit value = WTU
  - CS78 generates zero WTU
- CRA 1388
- Rank...when a Lecturer becomes a Tenure-track faculty, please update the Instructor/Advisor Table

- Ask your Chair for ALL the info!
  - Contracts
    - Class Assignments
    - Supervision Courses
    - AWTU - 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

When an instructor is teaching for a department other than their primary (home) department this is known as a split appointment.

A split appointment on the Workload Report is how we show how much resource (instructors in this case) it takes to teach the classes offered. This affects certain figures such as student to faculty ratio. It does not change what dept an instructor is paid from, or which dept gets the FTES for the course.

An instructor must have an entry in the Instructor/Advisor table for each department that they are teaching in and an APDB Dept Assignment percent for each department that they are teaching in. However, PeopleSoft has limited us to a maximum of three assignments, so if there are more than 3 appointments we have to pick the three largest and report those with the smaller appointments rolled into the primary dept. The instructors will appear on the report in each department that they have appointments to.

IF AN INSTRUCTOR IS PRIMARY TO YOUR DEPARTMENT, THAT INSTRUCTOR’S ENTIRE WORKLOAD MUST BE CORRECT FOR YOUR DEPARTMENT’S WORKLOAD REPORT TO BE CORRECT.

IF THE INSTRUCTOR IS NOT PRIMARY TO YOUR DEPARTMENT, ONLY YOUR PART OF HIS/HER WORKLOAD NEEDS TO BE CORRECT.

DON’T HOLD UP THE PRIMARY DEPARTMENT!
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...it’s unreliable!
Job Code tab

- Always look at the Job Code tab; it will tell you:
  - Incorrect empl rcds on class assignments - correct on Class
  - Incorrect empl rcds 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 RESP AWTU (Grants & Projects/Reimbursed) enter a description using the 5 digit project number as the very first part of the description, Assign Type is always either 22 or 23 for RESP AWTU, APDB Dept Id is always 132-RESP, and the WTU to being granted.

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.) Make sure that all the APDB Departmental Assignments add up to the total percent of the instructor’s appointment.
## AWTU – Assign Type

### Codes and Definitions

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

<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>
</table>
| 11          | Excess Enrollments       | a. For classes with census date enrollment of between 75 and 120 and exceptional workload, a graduate assistant or student assistant may be allocated.  
b. For classes with census date enrollment over 120, a graduate assistant, a student assistant, or an additional 3 WTU may be assigned. | List each qualifying course-section, with (enrollment), individually. | **Appropriate Uses:**  
• Release time for enrollments over 120  

**Not Appropriate Uses:**  
• Release time for enrollments under 120 students (currently at Deans’ discretion) |
| 12          | New Preparations         | 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. | List qualifying course(s) and section(s). | **Appropriate Uses:**  
• For a course *never taught* by the faculty member  

**Not Appropriate Uses:**  
• New course development (use #33)  
• New Faculty Release (NFR) - new course prep (use #36)  
• New Faculty Release (NFR) - Research (use #36)  
• New faculty mentors (use #23)  
• New program development (use #33)  
• Professional growth (use #22) |

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
D. AWTU Listing by Term
E. Short vs Long form type
F. Time Source Code examples

E. Short vs Long form types
Some types of AWTU need no further explanation or assessment; these are “Short Form” AWTU types, and requires a single sign-off by the Chair and Dean.

Other types of AWTU are not as straightforward, or, may be used in a number of ways. These require a “Long Form” where faculty can provide remarks on their outcomes; their signature is required, in addition to Chair and Dean.

<table>
<thead>
<tr>
<th>Short Form</th>
<th>Long Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>11</td>
<td>Excess Enrollment</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
AWTU changes

- Associating AWTU cost with Class
  - Description field now will contain the #Regs number

- Assign Type Reason
  - For reimbursed AWTU, Source and Rate are REQUIRED
The Workload Report...is a searchable PDF
Split appointments

Workload report,
Term Workload

Other department’s workload report
PeopleSoft – Faculty Teaching Schedule
Insight Reports - https://insight-int.csuchico.edu/Reports/Pages/Folder.aspx

Faculty Teaching Schedules!
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
- FTES Trades

**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 department 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 (HR contract amount) are entered under the “OSF” category, rather than the IFF or IAF.
The steps you take...

- Assign faculty to classes
- Enter AWTU in Term Workload
- Consult the checklists, emails, reminders
- Review the workload reports as they’re refreshed
- Sign up for Review with APSS
- Print and circulate for signatures
- Upload to APSS-Faculty-Workload-2198 signed docs
- Follow up on outstanding documents
- Move on to schedule building
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.
- We’re going to try to save our scans there, in lieu of putting pieces of paper with signatures into campus mail.
- This doesn’t exactly help you, unless you already scan your workload docs and keep electronic files.
  - It helps me, though, with the 500+ pieces of paper I receive each term, that someone (me) has to scan into the system.
  - It also gets you familiar with online document handling, as we move closer toward being paperless entirely.

- HOW DOES IT WORK??
Current shared files
https://csuchico.box.com/v/APSS-Shared-Depts
In Summary...

- Why, What, How, When, Where
- Assignments
- Checklists
  - APSS website
- 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 or hover on the “Faculty Workload” link on the left navigation bar to find:

▶ Workload site link
▶ Deadlines
▶ AWTU Codes and Definitions
▶ Workload Checklist
▶ Helpful guides (in progress – ask if you don’t see what you’re looking for!)

This training revised February 3, 2020