Faculty Workload Process
2 biggest issues with workload

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

- 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

Hello! Welcome to the official start of the Spring 2019 faculty workload process.

- This is your primary communication about workload; future emails will be...

- The workload report is available daily on the workload website, usually by 9:00.
  - 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,...

- All the documents you’ll need are on the APSS website and also in the shared documents I used to attach to this email are:
  - Workload Checklist
  - FTEs Trades Due Dates
  - Workload Due Dates
  - AWTU Time Source Codes
  - AWTU Form Types
  - AWTU Listing Quick Guide
Workload Checklist

https://csuchico.box.com/v/Workload-Checklist

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. Please refer to your handout (or the link above). The handout contains the (long) email address you will be using to “submit” your workload docs to the Box folder. Or, you can save them there directly!
Assigning faculty to classes
Why can’t I find my faculty in the list?
Instructor/Advisor Table
(have you used the PS Search?)

<table>
<thead>
<tr>
<th>Seq(enght) Nbr</th>
<th>1 = primary dept</th>
</tr>
</thead>
</table>

Effective Date:
8/1/201x
Or
1/1/201x
ONLY
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)

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!
PeopleSoft – Faculty Teaching Schedule
Insight Reports - [https://insight-int.csuchico.edu/Reports/Pages/Folder.aspx](https://insight-int.csuchico.edu/Reports/Pages/Folder.aspx)

Faculty Teaching Schedules!
AWTU – Assigned Weighted Teaching Units

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 qualifying course(s) and section(s). |      |
| 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:**
- Release time for enrollments of 120 or more students

**Not Appropriate Uses:**
- Release time for enrollments under 120 students

**Appropriate Uses:**
- For a course never taught by the faculty member
- New faculty development/incentive release time should only be used in this category when faculty are using the release time for new course preparation

**Not Appropriate Uses:**
- New program development (use #33)  
- New faculty development for research (use #22)  
- New faculty mentors (use #23)  
- Professional growth (use #23)  
- New course development (use #33)
How do I choose?

Short vs. Long form

AWTU

AWTU form type reference:
https://emss.int.csuchico.edu/APSS/FacultyWorkload/AWTU/AWTU_Listing.aspx**

<table>
<thead>
<tr>
<th>Short Form</th>
<th>Long Form</th>
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<tbody>
<tr>
<td>11</td>
<td>15</td>
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<tr>
<td>Excess Enrollment</td>
<td>Non-Traditional Instruction</td>
</tr>
<tr>
<td>12</td>
<td>22</td>
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<tr>
<td>New Course Preparations</td>
<td>Instructional Experimentation or Related Research</td>
</tr>
<tr>
<td>14</td>
<td>23</td>
</tr>
<tr>
<td>Course or Supervision Overload</td>
<td>Instruction-related Services</td>
</tr>
<tr>
<td>16</td>
<td>33</td>
</tr>
<tr>
<td>In Service Training for K-12</td>
<td>Curricular Planning or Studies</td>
</tr>
<tr>
<td>17</td>
<td>35</td>
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<tr>
<td>Credit by Exam/Eval</td>
<td>Instruction-related Facilities Planning</td>
</tr>
<tr>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Instructional Support of Grad Students</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td></td>
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<tr>
<td>Special Instructional Programs</td>
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<td>31</td>
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<tr>
<td>Advising</td>
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<td>32</td>
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<tr>
<td>Instruction-related Committee Assignments</td>
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<td>34</td>
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<td>Accreditation Responsibilities</td>
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<td>36</td>
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<tr>
<td>Probationary Faculty Activities (NFR)</td>
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<td>37</td>
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<td>Exceptional Service Level Activities (ESAT)</td>
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<td>41</td>
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<tr>
<td>CFA Activities</td>
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Reimbursed vs. University (unreimbursed)

AWTU

<table>
<thead>
<tr>
<th>Reimbursed Activity:</th>
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<tbody>
<tr>
<td>Chancellor’s Office Grants</td>
</tr>
<tr>
<td>CO Funded Proven Course Redesign</td>
</tr>
<tr>
<td>Graduation Initiative (G12025) – CO funded</td>
</tr>
<tr>
<td>Local CFA President</td>
</tr>
<tr>
<td>Research and Sponsored Program Grants</td>
</tr>
<tr>
<td>Research Foundation Grants</td>
</tr>
<tr>
<td>RSG grants</td>
</tr>
<tr>
<td>Statewide CFA Representative Union Leave (6.12 ONLY)</td>
</tr>
<tr>
<td>University Foundation Grants</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>University (Unreimbursed):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advising</td>
</tr>
<tr>
<td>Assessment</td>
</tr>
<tr>
<td>CELT Grants</td>
</tr>
<tr>
<td>Chico State Academic Senate</td>
</tr>
<tr>
<td>Exceptional Service from Provost’s office</td>
</tr>
<tr>
<td>Excess Enrollment (All AWTU code #11)</td>
</tr>
<tr>
<td>RCE-related course release</td>
</tr>
<tr>
<td>Research, Scholarship &amp; Creativity Awards (RSCA)</td>
</tr>
<tr>
<td>(Disbursed through RESP, but VPAA (locally funded))</td>
</tr>
<tr>
<td>State-Wide Academic Senate (5.13 ONLY)</td>
</tr>
</tbody>
</table>
The Workload Report...is a searchable PDF
### Split appointments

#### Workload report,

**Term Workload**

### Other department’s workload report

<table>
<thead>
<tr>
<th>Name</th>
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<th>IPF</th>
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<tbody>
<tr>
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<td>0.500</td>
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<td>SPLIT APPT</td>
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<tr>
<td></td>
<td>IPF: 0.292</td>
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**Total Individual: 1.0**

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<td></td>
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**Total Individual: 1.0**

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<th>Effort</th>
<th>IPF</th>
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<tbody>
<tr>
<td>R.J. Lindeman</td>
<td>Assoc Prof/Lect C</td>
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<td>0.950</td>
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<tr>
<td></td>
<td>IPF: 3.400</td>
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</table>

**Total Individual: 4.0**

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<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
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<th>IPF</th>
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</thead>
<tbody>
<tr>
<td>M.E. Matthews</td>
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<tr>
<td></td>
<td>IPF: 3.400</td>
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</tbody>
</table>

**Total Individual: 4.0**

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<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Effort</th>
<th>IPF</th>
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</thead>
<tbody>
<tr>
<td>S.D. Smith</td>
<td>Assoc Prof/Lect B</td>
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<td>0.950</td>
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<td>SPLIT APPT</td>
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<td></td>
<td>IPF: 3.400</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Individual: 4.0**
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 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 (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-2188 signed docs
- Follow up on outstanding documents
- Move on to schedule building
How can I be sure I’ve done it all correctly?
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.app.box.com/folder/46225571814
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, Coordinator of Academic Scheduling and Workload Reporting

▶ 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 5, 2019