August 28, 2015

Workload Frequently Asked Questions

Access Issues

A faculty member or a staff member needs access to Digital Measures to verify workload reports. How do I establish permissions for them to access Digital Measures?
Email digitalmeasures@utsa.edu and submit the name, title, and myUTSA ID (abc123) of the individual that needs access. Indicate what level of access is needed (college or department level), the name of the college or department, and whether they should have query or edit permissions. Copy the appropriate department chair for department access requests and the appropriate dean for college access requests.

New Faculty Accounts

I have a new faculty member that is not appearing in Digital Measures. What should I do?
New faculty accounts are created daily in Digital Measures based on faculty information entered into BANNER. The BANNER **SIAINST** screen for the effective term must be completely filled out, including making the faculty member's status "Active," indicating the appropriate college/department information, and updating the percent appointment. Their tenure status must also be entered into BANNER **SIAFPER** for the effective term for the workload to calculate properly. **Note:** New faculty populate to Banner with a Banner ID once their assignment is fully approved. If the faculty member is not in Banner, this usually means that their assignment has not finished processing in PeopleSoft.

Inactive Faculty Accounts

A faculty member is not teaching this semester or has resigned. How do I make him/her inactive in Digital Measures?
The faculty member's status should be made "Inactive" in the first screen of Banner **SIAINST** by census date for the effective fall and spring terms and by July 1st for the summer. Inactive faculty member updates are refreshed from Banner to Digital Measures once in the fall and spring terms shortly after census date and once during the summer on July 15th. You can also request that this be done manually in Digital Measures during the semester by emailing digitalmeasures@utsa.edu and listing the faculty members that need to be inactivated.

Why are inactive faculty members showing in my "Manage Data" dropdown list with zz in front of their names?
Inactive faculty members are not removed from the Digital Measures database. They are disabled, which means the faculty member can no longer access the system but their information remains in the system for reporting purposes. This process includes locking their

account and adding the letters zz to the beginning of their last names so that they drop to the bottom of the "Manage Data" lists.

How do I make an inactive faculty member active again in Digital Measures?
This is a two-step process because inactive faculty who are made active again in Banner do not automatically refresh to Digital Measures like new faculty do. First, the faculty member's status should be made "Active" again in the first screen of Banner **SIAINST**. Then, send an email to digitalmeasures@utsa.edu and request that they be re-activated in Digital Measures.

Can I run reports that include disabled (inactive) faculty members' information?
Yes. Inactive faculty members can still be reported on by designating both "enabled" or active and "disabled" or inactive faculty be included in the reporting requirements.

Updating Faculty Information

How often does Digital Measures refresh data?
Digital Measures updates changes to faculty information (appointment percentage, tenure status, home college and department), scheduled teaching and enrollment information daily until census date each semester. These types of changes should refresh overnight and be visible by the next day in Digital Measures. **Note:** On census date, this information becomes static until the workload reports are finalized. After the workload verification process is complete and reports have been archived, Digital Measures begins refreshes again to catch changes that are made after census date.

A faculty member is listed under the wrong college/department in Digital Measures. How do I correct this?
The faculty member's college/department information should be updated in the second screen of Banner **SIAINST** in the 'Faculty College and Department' block for the effective term. Make sure to designate this as the home department by checking "Home." This change should be made by the new home department. This information will refresh overnight to Digital Measures except during the workload verification period right after census date.

A faculty member's percent appointment is incorrect in Digital Measures. How do I correct this?
The faculty member's percent appointment should reflect only that portion of the appointment that is on faculty salaries (grant accounts are not included in the workload). It should be updated in the second screen of Banner **SIAINST** for the effective term, under the 'Faculty College and Department' block. This information will refresh overnight to Digital Measures except during the workload verification period right after census date.

A faculty member would like the percent appointment that he/she is on a grant account to appear in Digital Measures in addition to his/her percent appointment on faculty salaries.
Currently, Digital Measures pulls the faculty member's percent appointment from Banner, which should only reflect his/her percent appointment on faculty salaries. We are awaiting permission from PeopleSoft representatives to give the Office of Information Technology access to funding codes so that we can map all appointment information from PeopleSoft to Digital Measures. Once OIT is able to do this, we should be able to show grant and administrative appointments as well as instructional.

A faculty member's title is incorrect in Digital Measures. How do I correct this?
The faculty member's title should be updated for the effective term in the first screen of Banner **SIAINST** under "Category." This information will then refresh overnight to Digital Measures except during the workload verification period right after census date.

A faculty member's tenure status needs to be updated or tenure status is not showing at all in Digital Measures. What should I do?
The faculty member's tenure status can be updated/added for the effective term in the first screen of Banner **SIAFPER** under "Tenure." Select 0 for non-tenure, 1 for tenured, and 2 for tenure track. This information will then refresh overnight to Digital Measures except during the workload verification period right after census date.

Workload Requirements

What is the minimum workload for a fulltime tenured/tenure track faculty member?
For the Fall Workload Verification, the minimum workload is 9. For the Spring Workload Verification, the minimum workload is 9 for a total minimum workload of 18 for the academic year.

Who decided "internally" that we will require 9 workload hours per term of full-time tenure/tenure-track faculty, and why was it decided? The contracts that faculty sign state that they are responsible for 18 hours per academic year.
As the designee assigned to assure compliance with workload regulations, Sandy Welch, Senior Vice Provost for Institutional Effectiveness, made the decision to require faculty paid 'full time from the appropriations item Faculty Salaries' to meet a minimum of 9 total workload each long semester to address the reporting needs of both UT System and the Texas Higher Education Coordinating Board (THECB). For those paid less than 100% on state funding, the 9 hour minimum is proportionally reduced. The *Texas Education Code*, Sec. 51.402, notes "(a) The Coordinating Board, Texas College and University System, in cooperation with governing boards, institutional officials, and faculty representatives of general academic institutions of higher education, shall develop and recommend general policies and standard reports for academic

faculty workloads and services." The *Coordinating Board Faculty Workload Policy Guidelines for Texas Public Universities* (Guidelines) requires a "Report [via the CBM0008] of academic duties and services performed by each faculty member for the fall and spring semesters showing evidence of compliance with requirements established by the governing board" (our Regents) … each fall and spring semester. Regarding compliance, for example, if a faculty member was paid 100% from faculty salaries and had a total workload of 6 hours for instruction, we have to report what they were doing for the other 3 (research, service, administrative or other instructional responsibilities). Having this information in the Workload Reports provides the information needed for CBM008 each semester, because the releases that they receive for the deficit should align with one of the areas designated as appropriate in the Guidelines (research, service, administrative or other instructional responsibilities). It also accurately reflects the purpose for which the faculty member is given releases for the UT System Faculty Workload Reports when not meeting the minimum.

Why can't faculty "frontload" one semester and then have a lighter load the next semester?
The department chair can, if the schedule permits, offer the faculty member the option to frontload more hours in the fall semester (i.e. have workload credits in excess of 9 hours). In such a case, the total of 18 hours for the two long semesters of interest to UT System and 9 hours per semester of interest to the THECB would be easy to account for. Many faculty members exceed the minimum with teaching alone every year. Problems arise when, rather than frontloading more workload in the fall, the department assigns fewer than 9 hours of workload to the faculty member in total and then does not compensate with higher workload in the spring. Therefore, we both lack reasons to provide the THECB, and encounter a large workload deficit in the spring. The way workload reporting is structured eliminates both problems. *Regents' Rule* 31006 Sec. 8 states: "If a faculty member is found to be out of compliance, the institution shall take appropriate steps to address the noncompliance and to prevent such noncompliance in the future." Because there were many instances, we instituted the process of meeting 9 hours each long semester to prevent such noncompliance in the future. Thus, if a faculty member is teaching a lighter load in the fall, they must receive a course release (or releases) for whatever reason(s): to do research, work on official documents for accreditation, etc. to bring them to the minimum of 9.

What is the minimum workload for a non-tenured (NTT) faculty member?
NTT faculty members must meet the minimum workload based on their percent appointment on faculty salaries. For example, if the percent appointment is 25%, the minimum workload should be 3. If the percent appointment is 100%, the minimum workload should be 12. See the "Workload Calculations/Weights Sheet" on the Digital Measures home page for more details.

I have a new faculty member who is "ABD." He/she has completed all Ph.D. requirements except the dissertation. He/she has been appointed 100% as a Lecturer III until the dissertation is complete. What is the minimum workload for this faculty member?

Lecturer III is a non-tenure track title, so the faculty member must meet NTT workload requirements. The minimum workload for a 100% appointment as an NTT is 12. If the faculty member is below 12, a course release for new faculty and/or research can be used to supplement the workload. Course releases are given at the department chair's discretion.

Should faculty members with 0% appointments (such as Deans, Vice Provosts, and full-time staff) have workload reports?
No. Deans and Vice Provosts are paid 100% on A&P accounts and 0% on faculty salaries. Full-time staff are paid 100% on classified accounts and 0% on faculty salaries. Only those faculty members who have an active appointment greater than 0% on faculty salaries will have a workload report.

Scheduled Teaching

A faculty member's scheduled courses changed after census date. Why is this change not reflected in Digital Measures?
The 'Scheduled Teaching' screen in Digital Measures begins refreshing for a term when registration opens for that term. Refreshes end on census date for the current term so that Coordinating Board reports and Faculty Workload reports can be finalized. Changes to scheduled teaching after census date are discouraged unless it is absolutely necessary and will not be reflected in the workload reports.

A faculty member's cross-listed courses or linked (stacked) courses are calculating incorrectly on the workload report. How do I correct this?
Cross-listed courses and linked courses calculate in Digital Measures based on the codes that are put into the class schedule. When putting the class schedule in Banner, be sure to assign cross-listed codes to cross-listed courses and linking codes to linked courses or they will calculate as separate courses. Note: If you feel that a course is not calculating correctly and you have confirmed the class coding as correct, call Lorrie Smith at ext. 5188 to troubleshoot this error.

Course Releases and Justifications for Underloads

What is the "Hours Short" column on the "UTSA Faculty Workload Summary Report" and how does it work?
The "Hours Short" column indicates the number of hours needed for a faculty member to meet the minimum workload requirements based on his or her percent appointment on faculty salaries and the workload credits he or she has already generated. If a faculty member is short hours, he/she will need either a course release that describes what other type of work the faculty member has been approved for or a justification for the underload (such as FMLA).

Does the "Hours Short" column update once course releases are given to the faculty member?
Yes, the "Hours Short" column updates once the course release is entered in the 'Workload Information' screen in Digital Measures. You will need to rerun the "UTSA Faculty Workload Summary Report" to see the updates.

Why are we told not to record all of the workload course releases for faculty members if they are doing more things that take them above their required 9 hours?
UTSA's *Handbook of Operating Procedures* (*HOP*), Section 2.14, states that "[i]nstructional workload assigned at the University of Texas at San Antonio (UTSA) will meet the minimum teaching requirement terms of Regents' Rule 31006, commensurate with the percent of each instructor's salary paid from the appropriations source of funding, 'Faculty Salaries'." The purpose of the Workload Reports is to ensure that students' instructional needs are met. Thus, the emphasis is on providing approved reasons for a faculty member who does not meet the minimum teaching workload requirement, given the percent of her/his salary paid by state-funded faculty salary accounts.

If a faculty member is short hours and assigned a course release, should we assign the release for the exact amount that he/she is short or give the faculty member credit for a whole course?
Departments can give the full amount of the release for administrative titles (department chair, associate dean, director of center/institute), and academic advising. Instructional releases should be based on the guidelines provided by *Regents' Rule* 31006:

- 6.3 - Supervision of internships "shall be credited such that 12 total student semester credit hours taught will be considered the equivalent of one semester credit hour."
- 6.6 - Academic program coordination, TA coordination, lab coordination/supervision, and multiple section coordination shall be given "one semester hour of workload credit for each six sections coordinated up to a maximum of three semester hours of credit per semester."
- 6.11 – New faculty members "at the recommendation of the head of the department or comparable unit and upon approval of the institution head" may be granted "up to three semester hours of workload credit for each of two semesters. . . . during the first year of employment for the purpose of developing instructional materials for the courses he or she will teach."
- 6.12 – Faculty members involved in the development of new courses, new course formats, or new course materials may be granted workload credit "at the recommendation of the department chair and upon approval of the institutional head" up to a maximum of six semester hours of credit per semester.

The only limitation we have made on releases are those that fall under non-sponsored research. Departments should limit these releases to the number of hours that are needed to bring them to the minimum. This does not prevent a department chair from expending a full 3 hours as a substitute for a class if the faculty member is short one or two hours. However, if the faculty member only needed 1 hour to meet the minimum, providing six hours would indicate a larger research expectation than perhaps the faculty member would have time to commit.

My department gives new faculty the New Faculty workload credit for two years (less credit over a longer time). How should they record that second year?
Per *Regents' Rule* 31006, Section 6.11, "up to three semester hours of workload credit for each of two semesters may be given to a newly-appointed faculty member during the first year of employment for the purpose of developing instructional materials for the courses he or she will teach." It's discretionary as to whether to grant them. In subsequent years, if the department wants to give the faculty member releases, the chair should provide them for whatever purpose the releases are intended each semester (such as non-sponsored research). There is no rule to prevent continuing to assign releases for reasons laid out in *Regents' Rule* 31006.

A faculty member's course release is not displayed on the workload report or is incorrect on the workload report. How do I correct this?
Check with your department and college to see if the workload release was granted and put on the "Requests for Released Time Workload Credits" form. If it was not put on the form or is incorrect on the form, a new form will need to be submitted through the appropriate department chair to the dean of your college. Once the updated form is approved by the college, the course release can be entered into their 'Workload Information' screen in Digital Measures.

I have a teaching assistant with an active appointment but he/she does not meet the minimum workload requirements. What should I do?
As NTT faculty members, teaching assistants should be assigned 25% to teach one class, 50% to teach two classes, etc. If a TA is being paid more than 25% to teach one class, he/she should be doing other work for the department which will usually fall under program support or lab coordination. As a result, he/she can be given course releases for this work in the Workload Information screen in Digital Measures. NOTE: All teaching assistants who are assigned to classes should have the appropriate credentials for teaching that class per SACSCOC qualifications and the UTSA *Handbook of Operating Procedures* definitions.

I have a faculty member that did not meet the minimum workload requirements because he/she was on FMLA or Military Leave during the semester. How do I note this on the workload report?
Select "FMLA" or "Military Leave" from the choices in the dropdown box under "Justification for Underload" in the 'Workload Information' screen of Digital Measures. This justification will

then appear on the "UTSA Faculty Workload Summary Report" and the "UTSA Faculty Workload Detail Report." You will also need to attach the FMLA documentation from Human Resources (HR). This documentation is sent via email as an attachment from HR to the supervisor and timekeeper for the affected faculty member. You will need to contact the supervisor and/or timekeeper to get this documentation.

A faculty member teaches a hybrid course with separate sections alternating face-to-face and online on the same days and times. The workload calculates half of the actual amount the faculty member should receive for workload. What type of justification should be used?
Select "Separate hybrid sections alternating face-to-face and online, same days and times. Total SCH = ½ of actual." This is a choice in the dropdown box under "Justification for Underload" in the 'Workload Information' screen of Digital Measures. This justification will then appear on the "UTSA Faculty Workload Summary Report" and the "UTSA Faculty Workload Detail Report."

A faculty member teaches separate sections of a course that meet on the same day and time on alternating or separate weeks. The workload calculates half of the actual amount the faculty member should receive for workload. What type of justification should be used?
Select "Separate sections meeting same day and time on separate weeks. Total SCH = ½ of actual." This is a choice in the dropdown box under "Justification for Underload" in the 'Workload Information' screen of Digital Measures. This justification will then appear on the "UTSA Faculty Workload Summary Report" and the "UTSA Faculty Workload Detail Report."

Do I need to put the Dean for our college or a faculty member who is a Vice Provost on our college "Requests for Released Time Workload Credits" form?
No. Faculty who are 100% on A&P salaries, such as Deans and Vice Provosts, do not need to be listed on the "Requests for Released Time Workload Credits" form.

Workload Archives

Can changes be made to workload reports after the workload verification process ends?
No. All data from Banner stops refreshing on census date. Once the workload verification process ends, the workload reports and course release reports are archived in SharePoint as historical data.

How do faculty members access their archived workload reports?
The University is required to keep the last ten years of workload reports, so a faculty member can only request reports that occurred within this time period. Up until Spring 2009, workload reports were verified on hard copies and then filed within the college/department. From Spring 2009 until now, workload reports have been verified electronically, first in the FAIR system and now in Digital Measures. The electronic reports are archived in SharePoint. Designated college/department staff have access to the DM Archives as well as the hard copy files. To

request a copy, the faculty member should send an email to his/her department/college administrative staff person.

How do designated college/department staff access the SharePoint archive?
The SharePoint archive link can be accessed from the Digital Measures landing page.

A staff person needs access to the DM Archives. How does he/she get access?
Email digitalmeasures@utsa.edu and submit the name, title, and myUTSA ID (abc123) of the individual that needs access. Indicate what level of access is needed (college or department level) and the name of the college or department. Copy the appropriate department chair for department access requests and the appropriate dean for college access requests.