**Academic Appointment Information Report in Workday – School of Medicine**

**How do I use this report?**

This report includes when current faculty appointments begin and end, if they are expired, and dates for when tenure track and tenure ineligible faculty can be promoted or tenured. Departments should run this report every few months to catch expired appointments and look over their faculty data in Workday.

This guide focuses on using the report to identify **paid faculty** who need to begin the P&T process. The instructions also include information on running it for courtesy, unpaid, and visiting appointments.

For tenure eligible faculty: the report includes the **Probationary End Date** for TE (Tenure Eligible) faculty. They must achieve promotion to associate professor (TE) or tenure by this date.

For tenure ineligible faculty: the report includes the **Time in Job Profile** field. This can be used to determine time in rank for TI (Tenure Ineligible) faculty. Newly hired faculty are assigned a job profile, and the job profile changes when faculty are promoted.

For tenured faculty: the report includes **Academic Tenure Award Date** and **Academic Tenure Status**. These fields can be used to identify tenured associate professors who can go up for full tenured professor. There is no tenure probationary end date for this action; it is only based on meeting the promotion criteria based on their faculty track.

**Counting years in rank**

Because all in-cycle promotion and tenure actions are official on July 1 of a given year, SOM starts counting years in rank or years on the tenure clock from **June 30** of the hire year.

For example, an Assistant Professor hired on January 1, 2020 (early in the year) is eligible for promotion to associate professor on July 1, 2026. Another assistant professor hired on December 31, 2020 (late in the year) will also be eligible for promotion on July 1, 2026. One faculty member will have worked at UVA 6 months longer and the other 6 months fewer, but for P&T purposes, they have the same promotion eligibility date.

**Access to run Workday reports**

Access is limited to the administrator and usually one other person in a department or division. If the report doesn't come up for you in Workday, then you do not have access to run it. Ask your administrator to run it or ask them about requesting access through a [System Access Request](https://virginia.service-now.com/its/?id=itsweb_kb_article&sys_id=ddfd4ee0db655494d6655595ce96195d#workdayhcm) in Workday. Two system roles are needed: Academic Unit HCM Reporting Viewer and Academic Unit Reporting Specialist.

Please use this language when requesting Workday access. This is required by the Office of the Provost.

* “I need access to the Academic Appointment Information Report to [describe how you will use the report].”
* “I need to see these fields: [list fields].”
	+ Refer to the list under #8 below.

**Running the report**

1. Type **Academic Appointment Information** into the Workday search bar and click on the report.
2. Fill in either **Department** or **Appointee's Primary Positions Supervisory Org** field. This will narrow it down to your department.
	1. For Sup org: search for your chair's name. Select each of the orgs but skip any with "JM" and "UPG." JM is for non-benefited workers (students, wage, etc.) and UPG is for their medical center position.
3. Leave all boxes checked and also check **active workers only**.
	1. **Note:** **DO NOT** check “Exclude Tenured Full Professors”
4. **Academic appointment identifie**r
	1. Choose **Primary** and all the **Joint** options. There are very few joint appointments in SOM, but your department may have one.
	2. You can also run this report for courtesy appointments only. To do that, choose all the “dual” identifiers. This will show you the courtesy appointments that your faculty have, but unfortunately, it will not show you faculty in other departments who have courtesy appointments in your department.
5. **Academic track type category**
	1. Choose these two options to include all tenure track and tenure ineligible faculty:
		1. Academic General Faculty - School of Medicine
		2. Tenured / Tenure Track - School of Medicine
	2. Choose “Courtesy” and “Visiting” to capture those appointments, if desired. Courtesy contains many types of appointments in SOM.
		1. Courtesy
			1. Paid UVA faculty with an appointment in another department.
		2. Courtesy – MD – Clinical Faculty
			1. Per diem physicians paid by UPG who practice on Grounds.
		3. Courtesy – MD – Instructional Faculty
			1. Unpaid instructional faculty
		4. Courtesy – MD – Research Faculty
			1. Unpaid research faculty
		5. Wage
		6. Visiting
6. **Worker Type**
	1. For P&T, you only want **Employees.**
	2. Contingent workers will show you unpaid and visiting.
7. **Primary Employee Type**
	1. For P&T, you only want **Regular.**
8. **Reading the report after you run it - USEFUL FIELDS**
	1. **Identifying information fields** – keep B through E
	2. **Academic Appointment Identifier, Academic Appointment Title –** column G, H
	3. **Academic Rank, Academic Track Type, Academic Track Type Category** – columns K, L, M
	4. **Academic Appointment Start Date, End Date, Appointment is Active** – columns P, Q, R – Appointment is Active will be blank if the appointment is expired. Please renew them by [following the letters process](https://myuva.sharepoint.com/%3Aw%3A/r/sites/som/FA/Procedures/Faculty%20Affairs%20New%20Standard%20Operating%20Procedures%20and%20Related%20Forms/UVA%20SOM%20Faculty%20Affairs%20-%20SOP%20for%20Faculty%20Letters.docx?d=w4339344baa554ab0aae65c11a0c38c2e&csf=1&web=1&e=0kytxi).
	5. **FOR TE FACULTY: Tenure Probationary End Date – column V -** The date a tenure track faculty member must be promoted to associate or tenured. Do NOT use ‘old’ date in Column W.
		1. If their end date is June 30, 2024, they need to begin P&T in early 2023. It is about a 14-month cycle (April to the following June).
		2. If a faculty member is tenured, they will NOT have a probationary end date.
		3. Individual probationary end dates can be seen in Workday on the faculty member's academic profile: Academic > Current Appointments > magnifying glass by primary appointment.
		4. The probationary end dates include the COVID clock stop for faculty on the tenure track in 2020 and 2021. They received one more year of time. Other approved clock stops should also be reflected in this date.
	6. **Academic Tenure Status** – column Y – tenured, tenure eligible, or blank for TI faculty. Useful for identifying tenured associate professors who can go up for full tenured professor.

**Viewing individual probationary end dates**

If you need to view the probationary end dates for a small number of faculty, you can look at them individually instead of running the report. To view them individually, find the faculty member in Workday.

1. Click Academic in the blue menu.
2. Click Current Appointments in the upper menu.
3. Click the small magnifying glass next to “Identifier” in the table. If you don’t see the magnifying glass, then you do not have the Workday permissions to view it.
4. The probationary end date is on the right under Tenure Information.

Please reach out to Emily Schneider (yft2hj@uvahealth.org) for questions.