Faculty Workload Allocation Module
Recording Workload Implementation Plans (WIP)

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Effective Fall 2019 Regents Rule 31006 and associated UT Tyler Handbook of Operating Procedures 3.2.0 include revised faculty workload requirements. Under the new policy, workload assignments take the form of percentages of time assigned to each area of Teaching, Leadership/Service, and Scholarship. Academic Affairs and the Office of Information Analysis are revising reporting mechanisms and data analyses accordingly. In addition to internal purposes of monitoring effective use of faculty resources, faculty workload and percentage of time allocations are reported to the THECB each semester. An effective way to manage these data on an ongoing basis is required. This custom module in the student system, Campus Solutions (aka myUTTyler) was designed for this purpose. Chairs will record the workload agreements for all full-time faculty for each semester within two weeks of the census date.

Important note:
THECB reporting requires percentages be broken into five categories rather than three, so Teaching and Service will be further divided as shown below.

- **Instruction**: Teaching as Instructor of Record.
- **Administration**: Directly supporting instruction. Department Chairs/Directors, Program Coordinators and others engaged in activities considered to be directly related to the teaching function (Alternate Assignment - Department).
- **Academic Support**: Deans, Associate Deans and others engaged in service within a college. (Alternate Assignment - College)
- **Research**: Research, scholarship, creative activity. (Alternate Assignment - Research)
- **Other**: Faculty serving in various administrative roles, such as director of a non-instructional unit, chair of major committees, major projects at the institutional level on in the community. (Alternate Assignment - University)

Please direct questions about this module to Cindy Strawn in the Office of Information Analysis: cstrawn@uttyler.edu or 903-565-5818.
Creating Faculty Workload Allocation for Faculty

Chairs will be required to enter workload allocation percentages for faculty who fall under their purview. See below for instructions.

1. Within *myUTTyler*, access the Faculty Workload Allocation page via the following navigation:
   - Main Menu>UTT Customizations>UTT Institutional Analysis>Faculty Workload Allocation>Chair Workload>Faculty Workload Allocation

2. Click “Add a New Value”.

![Image of Faculty Workload Allocation page]

![Image of Faculty Workload Allocation page with a yellow arrow pointing to the “Add a New Value” button]
3. Enter the instructor’s Employee Id.

3a. If the ID is not known, you can click on the magnifying glass to search.

3b. First and Last Name are available as search fields. Enter any information known into the fields and click “Look Up”. All faculty who are active a Department that falls under the Chair’s purview will be available. Once you have located the correct faculty member, click the line with their information.
4. Enter or select the appropriate Term code.

4a. Clicking the magnifying glass will show the list of available Term codes as well as the Term Descriptions.
5. Enter or select the appropriate Academic Organization.

5a. Clicking the magnifying glass will show the list of available Academic Organizations for the faculty member as well as the Academic Organization Descriptions.

6. Once all three fields have been filled in, click “Add”.

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Find an Existing Value | Add a New Value

Search Results
View 100 | First 1 1 of 1 | Last
Academic Organization Description
HEALTHKINE Department of Health & Kinesiology
7. You can now enter the Workload Allocation information for this instructor.
7a. Enter percentage information for the five categories as relevant to the specific Instructor and Term. Any category which does not apply to the Instructor and Term may be left blank. All percentages must add up to 100% for the information to be Submitted for Dean approval.

7b. Comments or explanations about the percentages can be entered via the “Comments/Explanation” boxes. Comments are required if Percentage amounts are entered for the “Other” category only.
7c. Category descriptions can be accessed at any time by clicking the Category name.

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Comments/Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instruction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>0.00</strong></td>
<td></td>
</tr>
</tbody>
</table>

Clicking the Category names will produce pop-up boxes with descriptions of the categories.

7d. Available categories are:
- **Instruction**: Teaching as Instructor of Record.
- **Administration**: Directly supporting instruction. Department Chairs/Directors, Program Coordinators and others engaged in activities considered to be directly related to the teaching function (Alternate Assignment - Department).
- **Academic Support**: Deans, Associate Deans and others engaged in service within a college. (Alternate Assignment - College)
- **Research**: Research, scholarship, creative activity. (Alternate Assignment - Research)
- **Other**: Faculty serving in various administrative roles, such as director of a non-instructional unit, chair of major committees, major projects at the institutional level. (Alternate Assignment - University)
7d1. If a Percentage amount greater than zero is entered for the “Other” category, an additional selection box will apply which is required. The values available in that selection box are:

- **AuxOpertns**: Auxiliary Enterprise Operations
- **InstSuppor**: Institutional Support
- **PubService**: Public Service
- **StuService**: Student Services
- **Other**: Other – if this value is selected a comment is required to Submit the information.

7e. Enter percentage information for any authorized teaching overload as relevant to the specific Instructor and Term. This percentage is on top of the 100% for the five categories above and would be in addition to that total. Comments or explanations about the percentage can be entered via the “Comments/Explanation” box.

7f. The instructor’s current teaching schedule for the term will be displayed below the Workload Allocation area. Information if for reference only and includes: Course Description, Subject Area, Catalog Number, Section Number, Class Number, Session, Combined Sections ID, Load Factor, Class Status, Enrollment Capacity (Cap Enrl), and Current Enrollment (Tot Enrl).
7f. Information entered can be saved at any time and returned to later as needed. To save the information, use the “Save” button along the bottom of the page.

- You can return to saved information at any time by searching from the Faculty Workload Allocation landing page. Enter faculty information and click “Search”. Applicable rows will appear and allow you to select and make changes as needed.
8. Once all the information has been entered and is ready for Dean review, the page can be submitted via the “Submit” button. Once information has been submitted, it cannot be changed. A new entry for the faculty member would need to be created to make any adjustments. The “Submit” button will only be available to you if you are authorized by your role to submit for the designated faculty member.

8a. Chairs – you will have the ability to enter, save, and submit information for all faculty in departments that fall under your purview EXCEPT for yourself. You will not be able to enter information regarding your own allocations – a designee will need to enter and submit this for you.

8b. Designees – you will only have the ability to enter, save, and submit information for the Chair for whom you are a designee. If you attempt to enter information for any other faculty, you will only be able to save the information and WILL NOT be able to submit it for Dean review.
9. Certain situations will produce errors upon submission.

9a. **Total Workload Allocation less than 100.00**: If the total percentage does not equal 100.00, the following error will appear. Information cannot be submitted for Dean review if the percentages do not total 100.00.

   ![Message]

   Attention! Total Workload Allocation must equal (100.00) percent. (20200,6)

   OK

9b. **“Other” type not chosen**: If a percentage amount of greater than zero has been entered in the “Other” category and a value has not been chosen from the additional drop-down box that appeared, the following error will appear. Information cannot be submitted for Dean review if the “Other” percentage is greater than zero and a value has not been selected in the drop-down box.

   ![Message]

   Category "Other" requires a Type specification. Please select a Type from the drop-down menu. (20200,7)

   OK

9c. **“Other” explanation missing**: If a value of “Other” is selected from the drop-down box and an explanation has not been added to the corresponding “Comments/Explanation” box, the following error will appear. Information cannot be submitted for Dean review if a value of “OTHER” has been selected in the “Other” category drop-down box and no information has been provided in the corresponding “Comments/Explanation” box.

   ![Message]

   Category "Other" with Type specification OTHER requires a Comment/Explanation. (20200,8)

   OK
10. Once information has been successfully submitted, the status will change to “SUB” and the information will be locked. Any changes that need to be made will require a new Faculty Workload Allocation entry being created for the faculty member and Term.
Updating Existing Faculty Workload Allocation information for Faculty

If incorrect workload allocation information has been submitted for faculty, new information can be entered and re-submitted for Dean review. See below for instructions.

1. Within myUTTyler, access the Faculty Workload Allocation page via the following navigation:
   Main Menu>UTT Customizations>UTT Institutional Analysis>Faculty Workload Allocation>Chair Workload>Faculty Workload Allocation

2. Enter any known faculty information and click “Search”.

3. Select the correct faculty row.
4. Click the “+” button to create a new entry for the faculty member.

5. A new row will now exist for the faculty member which can be adjusted as needed with regards to percentages and comments.
5a. **Adjusting existing percentages or comments**: If the reason for the new row is to adjust percentages and/or comments from the previous row, the new information can now be entered and submitted. Once the new row has been submitted, it will go to the Dean for review in place of the original information entered. This row can also be saved before being submitted as needed.

Enter new information as needed in the "Percentage" and "Comments/Explanation" fields and submit when ready for Dean review.
5b. **Zeroing out allocations for faculty**: If the reason for the new row is that the faculty member should have NO allocation percentages for the given Term and Academic Organization, select the “Cancel Workload Allocation” check box.

5b1. The following Message box will appear.
5b2. If “Yes” is selected, the information will automatically resubmit, and the faculty information will be presented for review a second time as having NO allocations for a given Term and Academic Organization. *Note: Once "Yes" is clicked, the zero-allocation information will be submitted to the Dean for review automatically. Any changes from that point will require an additional row being added for the faculty member.*

5b3. If “No” is selected, you will be returned to the new row still in pending status and will have the ability to make changes and save or leave the page.
Reviewing and Approving Faculty Workload Allocation at the Dean Level

Deans will be required to review and approve workload allocation information submitted for faculty within their colleges. See below for instructions.

1. Within myUTTyler, access the Faculty Workload Allocation page via the following navigation:
   Main Menu>UTT Customizations>UTT Institutional Analysis>Faculty Workload Allocation>Dean Workload>Workload Allocation Approval

2. Click “Search” to pull up all records that are waiting for review. Records will be split across Terms and Academic Organizations. Select the Term and Academic Organization that you are interested in reviewing.
3. All faculty allocation information that has been submitted for the specific Academic Organization and Term will be visible. You can view the information by tab or you can expand the view to see all information at once.

3a. Expanded view

3b. The following information will be available:

- **Term**
- **Acad Org**: The Academic Organization under which the faculty member works.
- **Submitter**: the person who submitted the information for review.
- **Faculty ID**: the employee ID of the faculty member whose allocations are being reviewed.
- **Faculty Name**: the name of the faculty whose allocations are being reviewed.
- **Instruction Percentage**: Teaching as Instructor of record.
- **Instruction Comment**: comments or explanation for the Instruction percentage listed.
- **Administration Percentage**: Directly supporting instruction. Department Chairs/Directors, Program Coordinators and others engaged in activities considered to be directly related to the teaching function (Alternate Assignment - Department).
- **Administration Comment**: comments or explanation for the Administration percentage listed.
- **Academic Support Percentage**: Deans, Associate Deans and others engaged in service within a college. (Alternate Assignment - College)
- **Academic Support Comment**: comments or explanation for the Academic Support percentage listed.
- **Research Comment**: comments or explanation for the Research percentage listed.
- **Other Percentage**: Faculty serving in various administrative roles, such as director of a non-instructional unit, chair of major committees, major projects at the institutional level. (Alternate Assignment - University).
- **Other Reason**: additional duties that fall into the “Other” category.
  - **AuxOpertns**: Auxiliary Enterprise Operations
  - **InstSuppor**: Institutional Support
4. After reviewing the submitted information, select a value for the "Approval Status" column for each row that has been reviewed.

4a. Available Approval Status values are:
- **Pending**: This is the default value and comes pre-populated when a new row is submitted for review.
- **Approved**: This value means that the allocation information submitted for the given faculty member, Term, and Academic Organization is approved.
- **Not Approved**: This value means that allocation information submitted for the given faculty member, Term, and Academic Organization is incorrect and is therefore not approved.

4b. If all rows are approved, click the “Approve All” button and all statuses will automatically display as “Approved”.

5. Once the appropriate approval status has been chosen for each row, click “Submit”. All rows do not have to have the same “Approval Status” for the page to be submitted. Additionally, all rows do not have to be reviewed and submitted at the same time.

5a. Upon submission:
- **Approved rows:**
  - If the approval is submitted prior to the Term deadline, the process is completed, and no additional approvals are needed unless changes are made.
  - If the approval is submitted after the Term deadline, the approved rows will proceed to the Provost and/or Vice Provost for final review and approval. In this case, the following Message will appear.

Once a faculty allocation has been approved, its approval status cannot be changed unless the Chair submits new allocation information. It will remain in the Dean Workload Allocation Approval page in “Approved” status but will not be resubmitted when the “Submit” button is selected again.
- **Not Approv rows:**
  The Chair who submitted the allocation information will receive an email notifying them that the information was not approved. In this case, the following Message will appear.

  ![Message](Image)

  - If a row is submitted as “Not Approv” it will remain in that status and continue to appear for Dean review.
  - If the information is later determined to be correct, the row can be changed to “Approved” and resubmitted.
  - If the information is incorrect, the Chair can submit new information for the faculty member. Upon the Chair’s submission of the corrected information, the data will appear for Dean review again with the “Approval Status” set to “Pending”.

- **Pending rows:** Rows submitted in “Pending” status will remain in that status until another status is selected and will continue to appear for Dean review.

5b. If multiple Terms or Academic Organizations are available for Dean review, you can move back and forth between them using the “Previous in List” and “Next in List” buttons.
Reviewing and Approving Faculty Workload Allocation at the Administrative Approval Level

Faculty Workload Allocations are expected to be entered and reviewed by the Dean by a certain point in the semester. Information that is approved by the Dean after the deadline for a particular term requires approval by the Provost or Vice Provost.

1. Within myUTTyler, access the Workload Allocation Administrative Approval page via the following navigation:
   Main Menu>UTT Customizations>UTT Institutional Analysis>Faculty Workload Allocation>Admin Workload>Workload Allocation ADM Approval

2. Click “Search” to pull up all records that are waiting for review. Records are available by Term. Select the Term that you wish to review.
3. All faculty allocation information which was submitted after the deadline for the Term will be visible. You can view the information by tab or you can expand the view to all information at once.

3a. Expanded View

3b. The following information will be available:

- **Term**: The Academic Organization under which the faculty member works.
- **Submitter**: the person who submitted the information for review.
- **Faculty ID**: the employee ID of the faculty member whose allocations are being reviewed.
- **Faculty Name**: the name of the faculty member whose allocations are being reviewed.
- **Instruction Percentage**: Teaching as Instructor of record.
- **Instruction Comment**: comments or explanation for the Instruction percentage listed.
- **Administration Percentage**: Directly supporting instruction. Department Chairs/Directors, Program Coordinators and others engaged in activities considered to be directly related to the teaching function (Alternate Assignment - Department).
- **Administration Comment**: comments or explanation for the Administration percentage listed.
- **Academic Support Percentage**: Deans, Associate Deans and others engaged in service within a college. (Alternate Assignment - College)
- **Academic Support Comment**: comments or explanation for the Academic Support percentage listed.
- **Research Comment**: comments or explanation for the Research percentage listed.
- **Other Percentage**: Faculty serving in various administrative roles, such as director of a non-instructional unit, chair of major committees, major projects at the institutional level. (Alternate Assignment - University).
• **Other Reason**: additional duties that fall into the “Other” category.
  - **AuxOpertns**: Auxiliary Enterprise Operations
  - **InstSupport**: Institutional Support
  - **PubService**: Public Service
  - **StuService**: Student Services
  - **Other**: Other – if this value is selected a comment is required.

• **Other Comment**
• **Overload**: Faculty who have an approved teaching overload.
• **Overload Comment**
• **Date Submitted**

4. After reviewing the submitted information, select a value for the “Administrative Approval Status” column for each row that has been reviewed.

4a. Available Approval Status values are:

- **Pending**: This is the default value and comes pre-populated when a new row is submitted for review.
- **Approved**: This value means that the allocation information submitted for the given faculty member, Term, and Academic Organization is approved.
- **Not Approv**: This value means that allocation information submitted for the given faculty member, Term, and Academic Organization is incorrect and is therefore not approved.

5. Once the appropriate approval status has been chosen for each row, click “Submit”. All rows do not have to have the same “Approval Status” for the page to be submitted. Additionally, all rows do not have to be reviewed and submitted at the same time.
5a. Upon submission:

- **Approved rows:** Rows are considered complete and no further review will be necessary unless changes are made to the information by the Chair.
- **Not Approved rows:** The Dean who submitted the allocation information for review will receive an email notifying them that the information was not approved. In this case, the following Message will appear.

![Message]

- If a row is submitted as “Not Approv” it will remain in that status and continue to appear for Administrative review.
- If the information is later determined to be correct, the row can be changed to “Approved” and resubmitted.
- If the information is incorrect, the Chair can submit new information for the faculty member. Upon the Dean’s approval of this new information, the data will appear for Administrative review again with the “Approval Status” set to “Pending”.

- **Pending rows:** Rows submitted in “Pending” status will remain in that status until another status is selected and will continue to appear for Administrative review.

5b. If multiple Terms are available for Administrative review, you can move back and forth between them using the “Previous in List” and “Next in List” buttons.
Viewing Faculty Workload Allocation information for a Term and Academic Organization as an Administrative Services Officer

ASOs will have the opportunity to view workload allocation information that has been submitted for faculty who work within their college. See below for instructions.

1. Within *myUTTyler*, access the ASO Workload Review page via the following navigation:
   Main Menu>UTT Customizations>UTT Institutional Analysis>Faculty Workload Allocation>ASO Workload>ASO Workload Review

2. Click “Search” to pull all Term and Academic Organization information that are available for your viewing. You will only see Academic Organizations for which you have been granted access based on your position. Select the Term and Academic Organization that you are interested in viewing.
3. All faculty allocation information that has been submitted for the specific Academic Organization and Term will be visible. You can view the information by tab or you can expand the view to see all information at once.

3a. Expanded view

3b. The following information will be available:

- **Term**: The Academic Organization under which the faculty member works.
- **Submitter**: the person who submitted the information for review.
- **Faculty ID**: the employee ID of the faculty whose allocations are being reviewed.
- **Faculty Name**: the name of the faculty whose allocations are being reviewed.
- **Instruction Percentage**: Teaching as Instructor of record.
- **Instruction Comment**: comments or explanation for the Instruction percentage listed.
- **Administration Percentage**: Directly supporting instruction. Department Chairs/Directors, Program Coordinators and others engaged in activities considered to be directly related to the teaching function (Alternate Assignment - Department).
- **Administration Comment**: comments or explanation for the Administration percentage listed.
- **Academic Support Percentage**: Deans, Associate Deans and others engaged in service within a college. (Alternate Assignment - College)
- **Academic Support Comment**: comments or explanation for the Academic Support percentage listed.
- **Research Comment**: comments or explanation for the Research percentage listed.
- **Other Percentage**: Faculty serving in various administrative roles, such as director of a non-instructional unit, chair of major committees, major projects at the institutional level. (Alternate Assignment - University).

- **Other Reason**: additional duties that fall into the “Other” category.
  - AuxOpertns: Auxiliary Enterprise Operations
  - InstSupport: Institutional Support
  - PubService: Public Service
  - StuService: Student Services
  - Other: Other – if this value is selected a comment is required.

- **Other Comment**
- **Overload**: Faculty who have an approved teaching overload.
- **Overload Comment**
- **Date Submitted**
- **Approval Status**
Viewing Faculty Workload Allocation information for a Term and Academic Organization as a Faculty Member

Faculty members will have the ability to view the Faculty Workload Allocation information that has been submitted for them. See below for instructions.

1. Within *myUTTyler*, access the Faculty Review page via the following navigation:
   Main Menu>UTT Customizations>UTT Institutional Analysis>Faculty Workload Allocation>Faculty Review>Faculty Review

2. Click “Search” to pull all Term information that has been entered for you. Select the Term that you are interested in viewing.
3. All faculty allocation information that has been submitted for you for the specific Term will be visible. You can view the information by tab or you can expand the view to see all information at once.

3a. Expanded view

3a. The following information will be available.

- **Term**
- **ID**
- **Last Name**
- **First Name**
- **Acad Org**: The Academic Organization for which the workload allocation applies.
- **Status**
- **Instruction Percentage**: Teaching as Instructor of record.
- **Instruction Comment**: comments or explanation for the Instruction percentage listed.
- **Administration Percentage**: Directly supporting instruction. Department Chairs/Directors, Program Coordinators and others engaged in activities considered to be directly related to the teaching function (Alternate Assignment - Department).
- **Administration Comment**: comments or explanation for the Administration percentage listed.
- **Academic Support Percentage**: Deans, Associate Deans and others engaged in service within a college. (Alternate Assignment - College)
- **Academic Support Comment**: comments or explanation for the Academic Support percentage listed.
- **Research Comment**: comments or explanation for the Research percentage listed.
- **Other Percentage**: Faculty serving in various administrative roles, such as director of a non-instructional unit, chair of major committees, major projects at the institutional level. (Alternate Assignment - University).
- **Other Reason**: additional duties that fall into the “Other” category.
  - **AuxOpertns**: Auxiliary Enterprise Operations
- **Total**
- **Overload**: Faculty who have an approved teaching overload.
- **Overload Comment**
- **Created By**: The person (Chair) who submitted the information.
- **Created Date**: The date that the information was submitted.