Attachment B

INSTRUCTIONS FOR COMPLETING INTERNAL FACULTY
WORKLOAD REPORT

1. After the census date of each semester, the Faculty Records Office in the Office of the Provost and Vice President for Academic Affairs prepares the Internal Faculty Workload Report and sends to each dean a copy of the Internal Faculty Workload Report for their College. The deans review the report and distribute it to the chair of each academic unit within their College. Each chair is responsible for determining faculty work assignments in accordance with the provisions of PPS 7.05, Faculty Workload Policies and applicable department policy statements, and for verifying these assignments for each faculty member.

2. The Internal Faculty Workload Report is used as a worksheet for verifying compliance with PPS 7.05. It lists each faculty member and each person assigned as teacher of record for a course, lab, clinic, etc. It also shows PLID, rank, job code, contract dates, full-time equivalents (FTE), total semester salary, type of instruction for each course, course hours, enrollment, SCH, amount of workload credit automatically generated for teaching each class and total workload credits. An asterisk (*) to the left of a course indicates an off-campus class. Stacked classes are identified by an "ST" designation. This report also indicates whether the course is out-of-load for credit, out-of-load for no credit, or in-load for no credit under the "comments" column.

    Corrections, deletions, and additions to workload credits are to be marked in red. The edited workload report should be returned to the Faculty Records Office by the established deadline.

3. Assignments and adjustments should be reported and verified in accordance with the categories provided in PPS 7.05.

    a. The chair is responsible for providing a justification in any case in which the number of workload credits assigned exceeds the "Normal Number of Workload Credits' required. Documentation of the provided justification should be kept on file in the academic unit but is not required to be submitted to Faculty Records.

    b. Chairs are responsible for providing a justification for workload credits assigned for other professional responsibilities/activities as well as a description of the specific outcomes/duties that are anticipated based on the awarding of these credits. Documentation of the justifications and descriptions of the specific outcomes/duties must be kept on file in the academic unit but are not required to be submitted to the Faculty Records Office. Credits for this work are given by choosing the appropriate adjustment/assignment waiver code from Attachment 2 and writing the code number and credit amount next to the faculty member's record on the workload report.

4. Some explanations for possible errors on the Internal Faculty Workload Report and corrective actions which may be necessary are identified below:

   a. Wrong faculty member given credit for a class. Contact the Registrar's Office immediately. This indicates an error in the class section file.

   b. FTE, salary, and job code missing. This is due to a delay in processing the PCR. This information is necessary for completing the report. If the academic unit has initiated a PCR, contact the Faculty Records Office to determine the status of the PCR.

   c. Incorrect workload credit for a particular class, lab, clinic, etc. To change the calculated workload credit for a class, lab, clinic, etc., contact the Faculty Records Office and indicate the new workload calculation code for that course.

   d. Noncompliance due to workload deficit for FTE. If a faculty member's workload credit is not at least 75% of the required workload for the faculty member's FTE, then equivalent credit must be given in order to be in compliance, or a PCR must be initiated to adjust the individual's salary and FTE.

5. After the Faculty Records Office corrects the data base, the final Internal Faculty Workload Report will be distributed to College Deans. Deans distribute a copy of the final report to each respective academic unit. The chair will provide each faculty member with a copy of his or her workload report. The chair will then distribute a copy of the academic unit's workload report, or a summary report, to the academic unit's personnel committee in accordance with PPS 7.05.

6. The Internal Faculty Workload Report is electronically converted to the format required by the Coordinating Board (CBM008). In this format, it is matched to the Coordinating Board Class Report (CBM004). Possible errors that can be detected at this point include:

   a. A teacher of record on the CBM004 is not listed on the CBM008. If a faculty member is listed on the CBM004, but not on the CBM008, either the PCR for that individual has not been processed, or the class section file has not been updated. The Faculty Records Office will contact the chair of the academic unit if action is required.

   b. Missing personnel data (rank, highest degree, year of birth, gender, ethnicity, etc.) This error usually occurs when information has not been reported to the Human Resources and/or Faculty Records Offices. The Faculty Records Office staff will correct the error.